EUT Course - 180

Agency Learn for Administrators

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CAPPS Learn

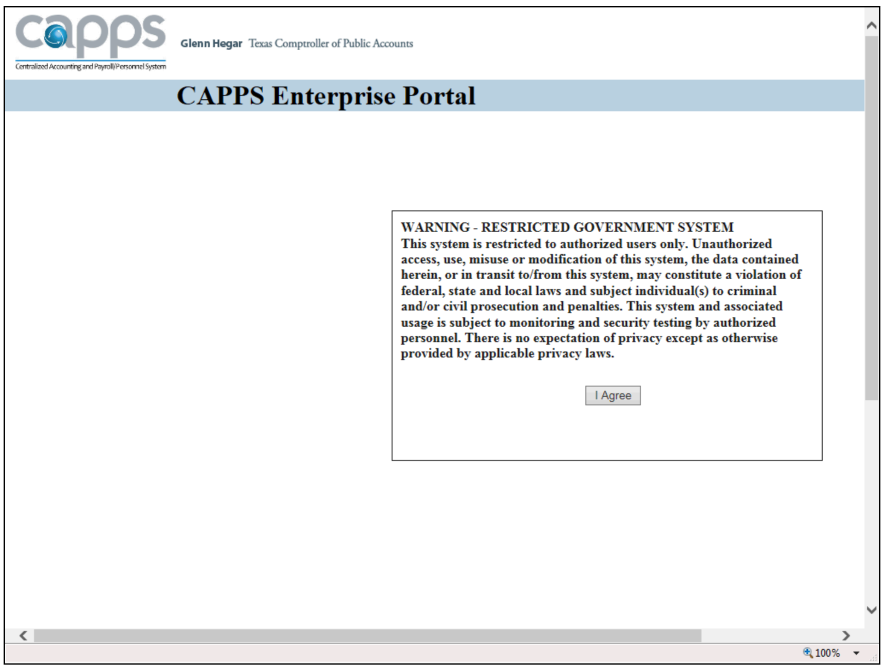
S1 - Learn Overview

Administrator Navigation

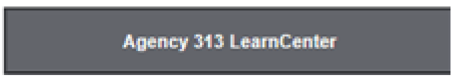
Section 1 - Lesson 1, Exercise 1 - **Administrator Navigation**

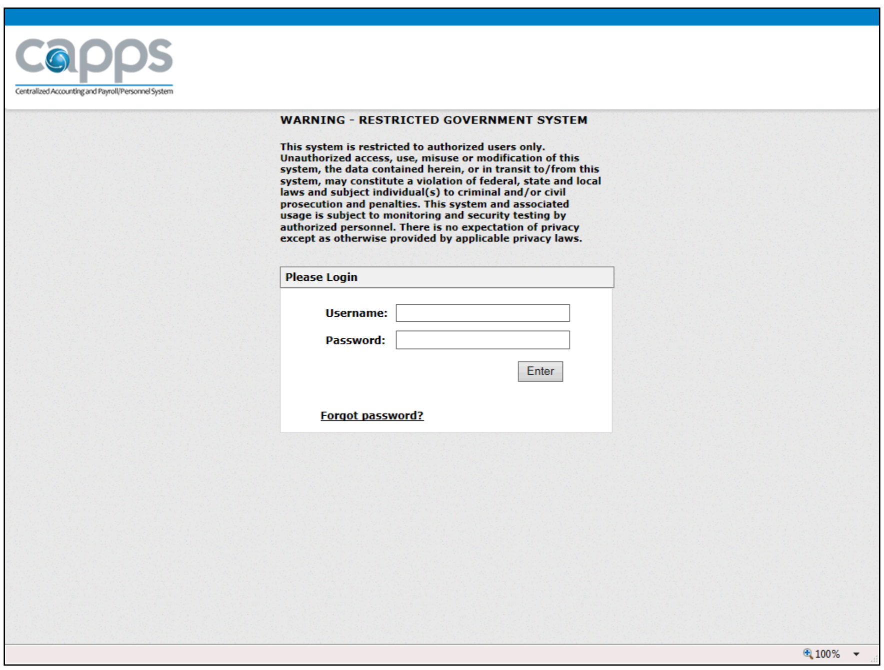
Procedure

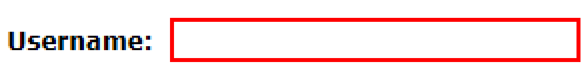
In this lesson, you will learn how to navigate in CAPPS Learn as an administrator (admin).



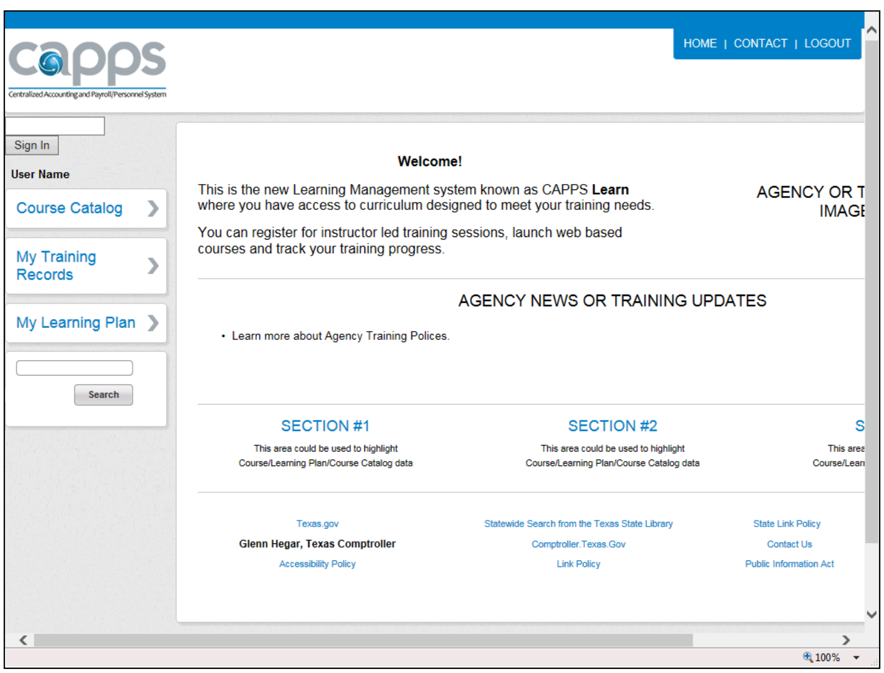
Step	Action
1.	Click the **I Agree** button. I Agree
2.	Enter the desired information into the **User ID:** field. Enter "**train**". **User ID:**
3.	Press **[Tab]**.
4.	Enter the desired information into the **Secure Password:** field. Enter "**train1**". **Secure Password:**

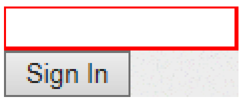
Step	Action
5.	Click the **Sign In** button. 
6.	This is the **CAPPS Portal**. The **Introduction** course explains this page in detail. Depending on your User access you may see different options listed. You should see the button for the agency in which you have access for **CAPPS Learn**. For training, you will use Agency 313 LearnCenter. Click the **Agency 313 LearnCenter** button. 

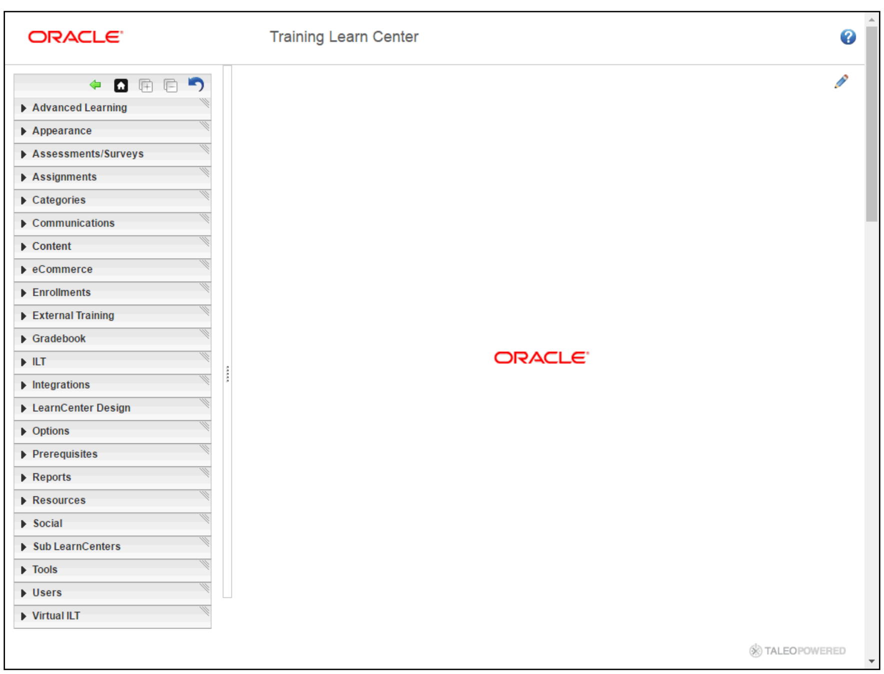


Step	Action
7.	For **CAPPS Learn**, there is a separate login page. Enter the desired information into the **Username:** field. Enter "**10101010101**". 
8.	Press **[Tab]**.

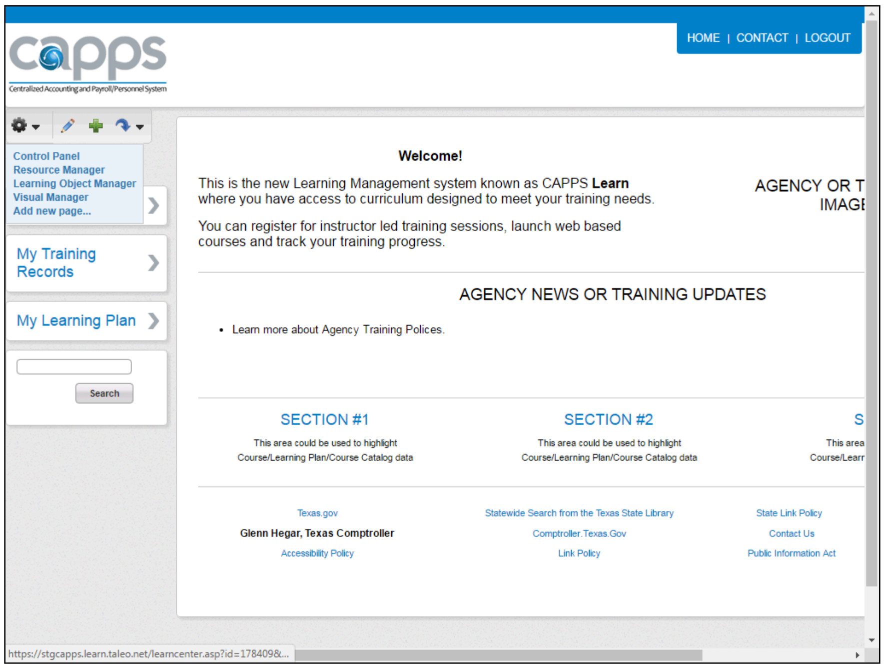
Step	Action
9.	Enter the desired information into the **Password:** field. Enter "**train1**". 
10.	Click the **Enter** button. 
11.	Welcome to the **CAPPS Learn Home Page**! Every user will see this page once logging in. There are different sections to this page so let's walk through them.
12.	The Home page contains: **#1 - Header Pages** **#2 - Left Nav Bar** and **#3 - Page Regions**. The Page Regions are split up by the dotted red line. This is a CPA-configured baseline webpage. It consists of multiple web pages designed to display content and information to users. Agencies have latitude in webpage design.



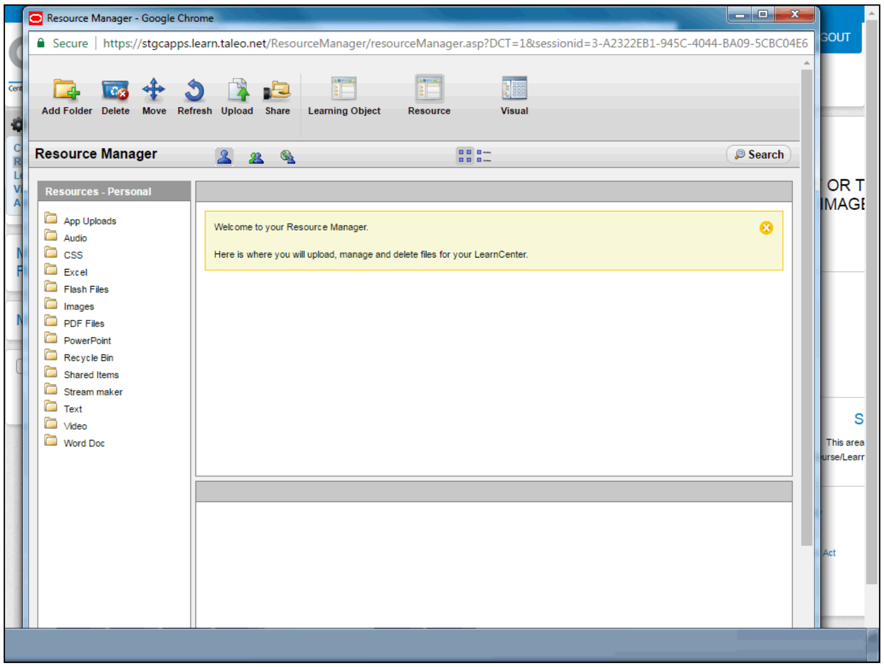
Step	Action
13.	From the Home Page, those users with access to the **Management Access Code** can navigate to the **Management Controls** of **CAPPS Learn**. Enter the desired information into the **Sign In** field. Enter "**train1**". 
14.	These are the **Control** icons of CAPPS Learn. Once you rest your pointer on the thumb wheel icon corresponding drop-down menus will display.
15.	The **Management Control** menus that you will see depends on the User access that is assigned.
16.	**Control Panel** is the command center for a LearnCenter.
17.	The **Control Panel** is the behind-the-scenes area where you manage most of what Users see and do in the LearnCenter. The **Control Panel** is only accessible to those who have been granted permission. This page will be discussed in further detail shortly.



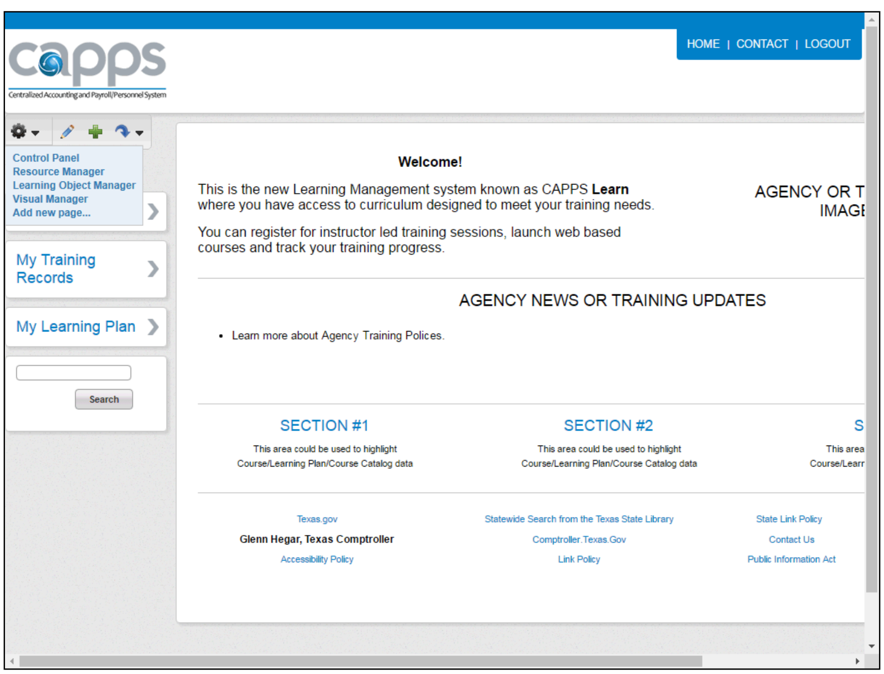
Step	Action
18.	Click the **Back Arrow** button.



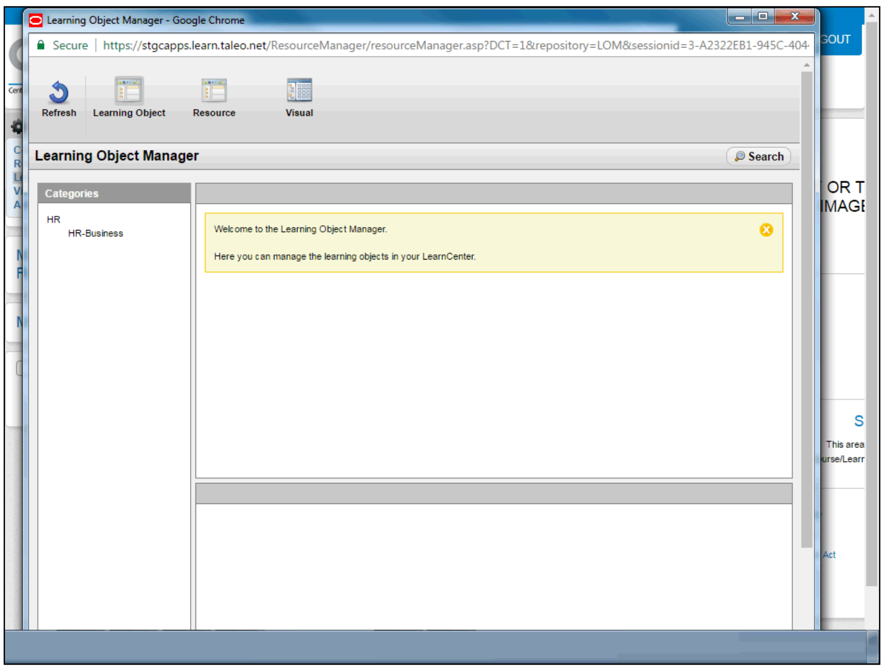
Step	Action
19.	Click the **Resource Manager** link. Resource Manager
20.	The **Resource Manager** stores all uploaded multimedia and files used in the various applications. Multimedia and file resources (over 10 mb) that you want to use in the LearnCenter must be uploaded to the Resource Manager before they can be used. Once uploaded, resources can be used in an unlimited number of pages, courses, and sessions.
21.	**Resource Manager** contains a set of standard folders labeled by file type. You can upload your resources into these folders according to their type.



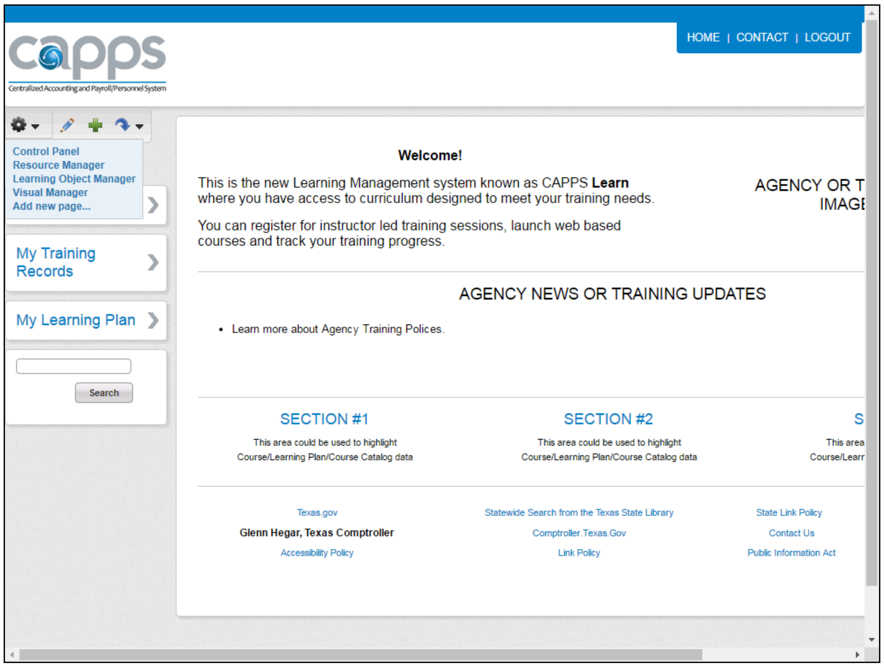
Step	Action
22.	Click the **Close** button. 



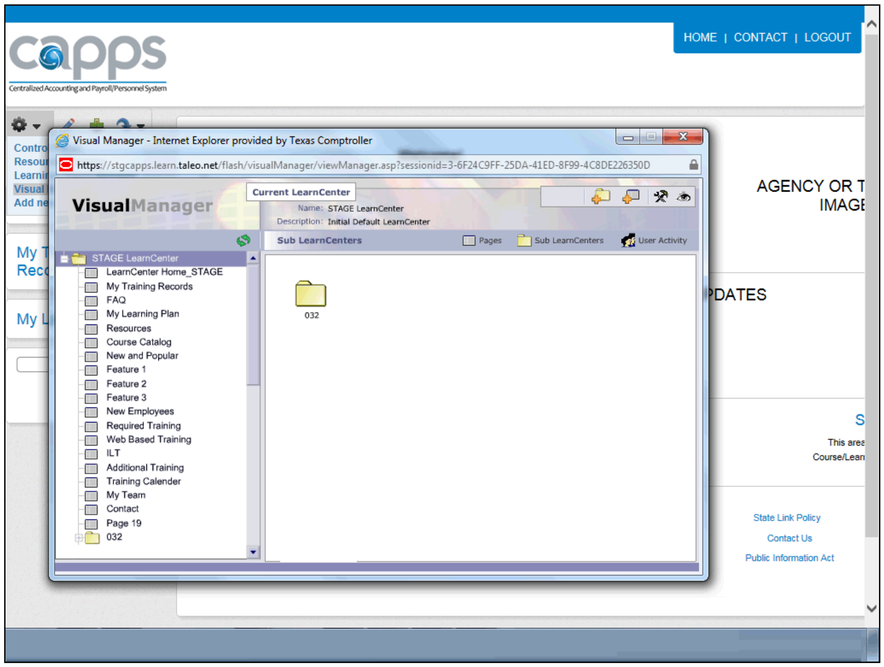
Step	Action
23.	Click the **Learning Object Manager** link. 
24.	The **Learning Object Manager** (LOM) provides a graphical way to manage your Learning Objects. You can access it from the Management Control section of the main LearnCenter page by either clicking Resource Manager or Learning Object Manager (LOM).



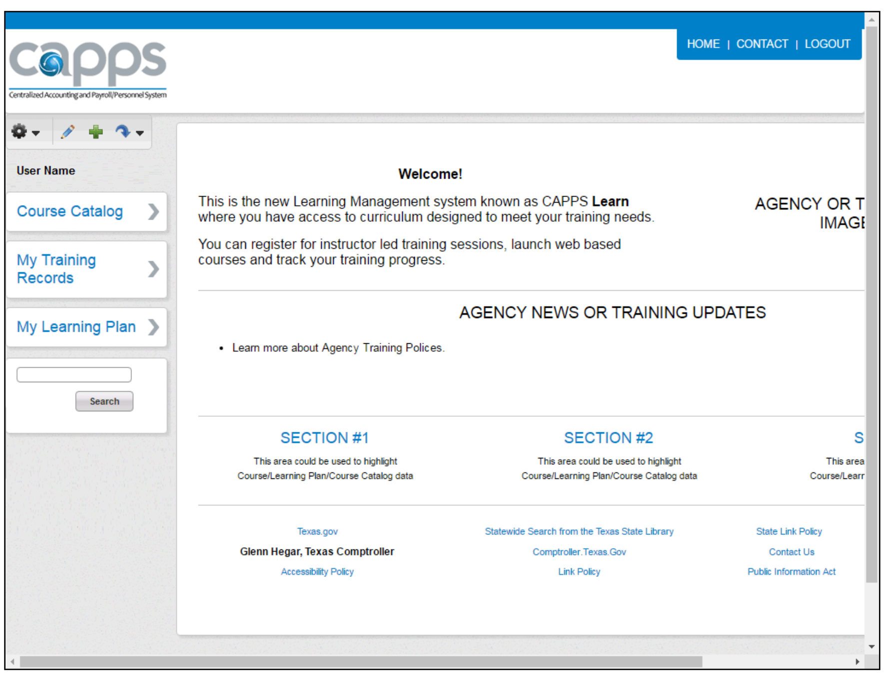
Step	Action
25.	Click the **Close** button. 



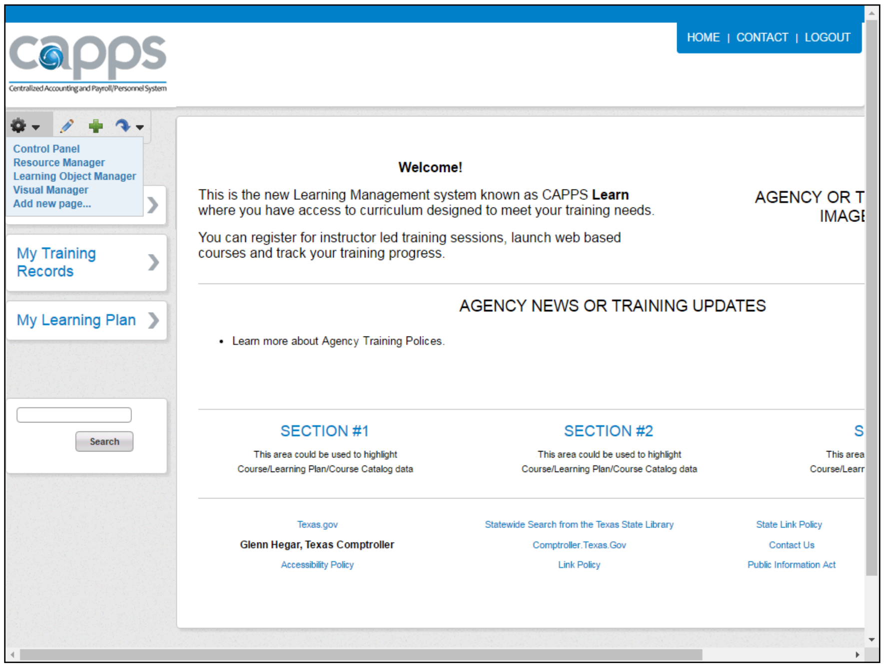
Step	Action
26.	Click the **Visual Manager** link. Visual Manager
27.	The **Visual Manager** provides a graphical way to manage your LearnCenter.



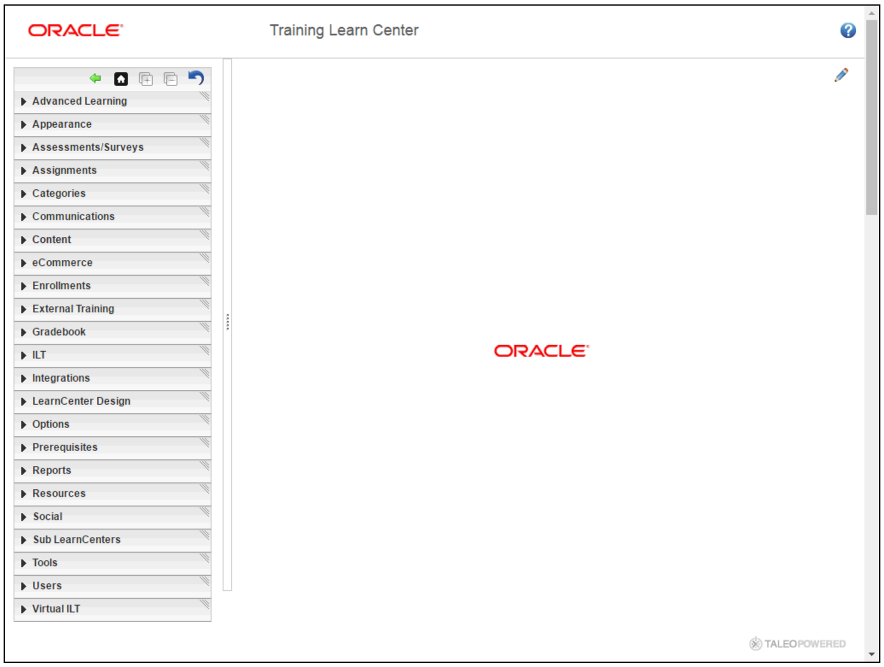
Step	Action
28.	Click the **Close** button. 



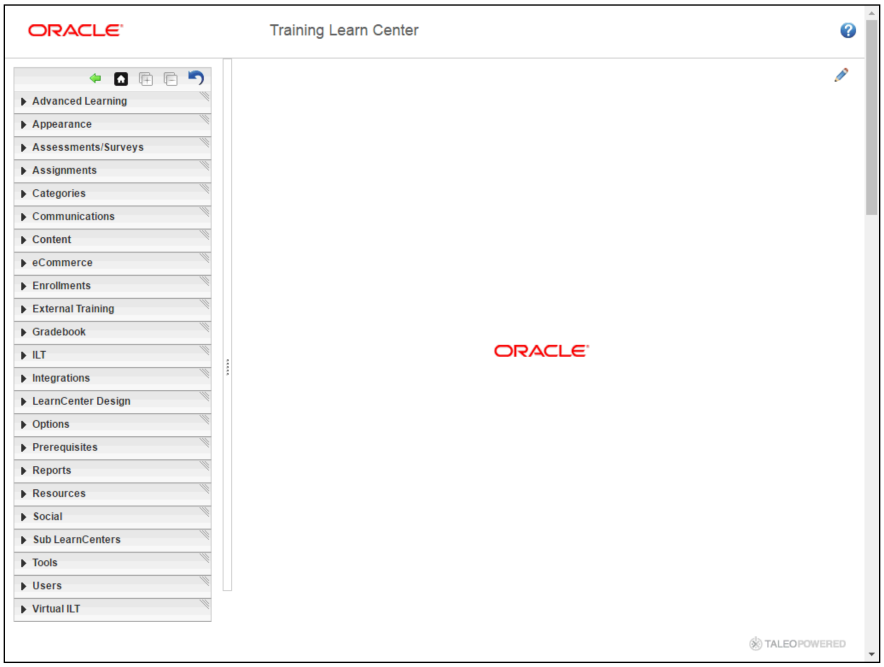
Step	Action
29.	LearnCenters have two viewing modes available to Administrators - **Edit** and **Preview** Mode. Most of the work you do to LearnCenter pages are done in Edit Mode. Click the **Edit Mode** button. 
30.	**Edit Mode** allows you to make changes to the selected LearnCenter page.
31.	To see what your changes look like to End Users, you can view them in Preview Mode. Click the **Preview Mode** link. 
32.	**Preview Mode** allows you to see any edits made to the LearnCenter Home Page.
33.	You can add as many pages to your LearnCenter as you like. Click the **Add New Page** button. 
34.	When Adding a New Page, you are also able to **Insert a New Area** to the page.
35.	The **Drop Down** button allows you to select a specific page without having to navigate.



Step	Action
36.	Click the **Control Panel** link. Control Panel
37.	The **Control Panel** has three areas: 1) ControlPanel Control icons 2) Navigation Bar 3) Content Area (Next Page)
38.	This Content Area will contain information once options are selected from the Navigation Bar.
39.	Let's review the Control Panel Control icons.
40.	The **Back** button takes you back to the LearnCenter Home Page.
41.	The **Control Panel Home** button takes you out of a menu and back to the Navigation Bar.



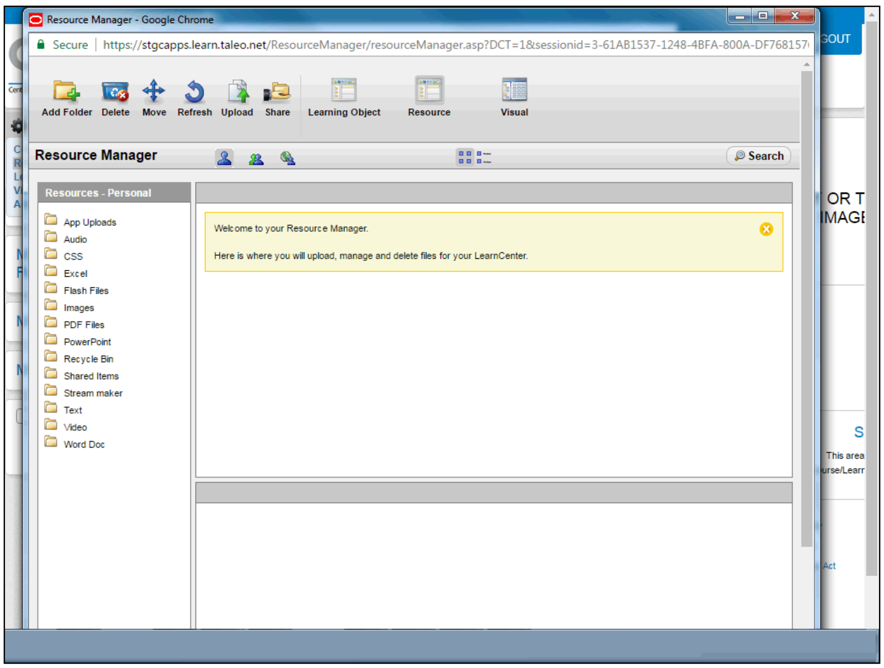
Step	Action
42.	Click the **Expand Button** button. 
43.	The **Expand** button opens up all of the options within a menu.
44.	Click the **Collapse** button. 
45.	The **Collapse** button collapses the menus and saves space on the page.
46.	Click the **Reset** button. 
47.	The **Reset** button expands the Navigation bar again.
48.	You will find that Collapsing the Menu will save space on the page when navigating. Click the **Collapse** button. 
49.	**System Administrators** have access to the majority of their Sub LearnCenter Management Control menus, however their main responsibilities may fall within the highlighted areas.



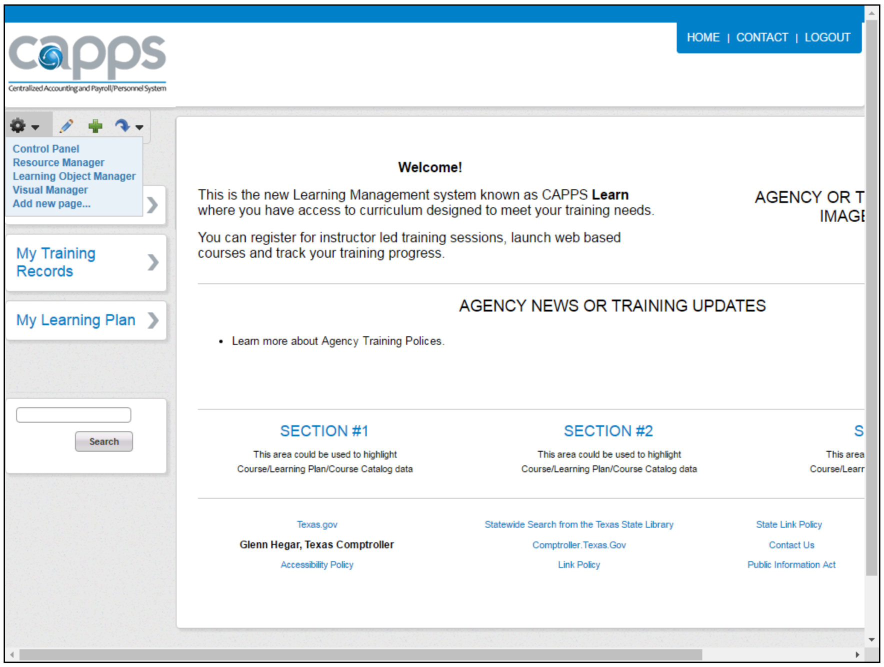
Step	Action
50.	Click the **Communications** link. ▶ Communications
51.	System Administrators will use the **Communications** menu to manage the LearnCenter messaging.
52.	Click the **Options** link. ▶ Options
53.	The **Options** menu is used to define the Sub LearnCenter settings and to enable certain features for the LearnCenter. System Administrators will be responsible for specific configurations and system maintenance.
54.	Click the scrollbar.
55.	Click the **Reports** link. ▶ Reports
56.	Administrators will have access to reports based on permissions.
57.	Click the **Users** link. ▶ Users
58.	The **Users** area is where Accounts & Profiles, Groups, Roles and Supervisor Accounts are managed.

Step	Action
59.	Click the scrollbar.
60.	Now collapse the menus to save space on the page so that we can review access for the Content Administrator. Click the **Collapse** button.
61.	The **Content and Training Administrator** responsibilities may fall within these highlighted areas.
62.	Click the **Assessments/Surveys** link. Assessments/Surveys
63.	The **Assessments/Surveys** menu is used to measure knowledge before and after a training. The Survey tool can also be utilized for WBT or ILT session evaluations. You are able to establish a pool of questions/answers for assessments and surveys.
64.	Click the **Assignments** link. Assignments
65.	The **Assignments** menu enables you to view, add, edit user grades and assignments.
66.	Click the **Categories** link. Categories
67.	**Categories** can be thought of as folders in which you keep related items. The Categories menu is used to help organize and manage enrollments, training sessions, assignments, assessments, etc.
68.	Click the **Content** link. Content
69.	**Content** refers to formats for Web-based training (WBT) created in the LearnCenter or by third party authoring tools. Content includes WBT, AICC Courses, SCORM Classes and Courses. The **Content** menu is used to prepare, organize, and import the learning content you will be delivering to users.
70.	**Content Administrators** will also have access to **Resource Manager**. Let's go back and review **Resource Manager**. Click the **Back** button.

Step	Action
71.	Click the **Resource Manager** link. Resource Manager
72.	The **Content Administrators** can upload, manage and delete files using **Resource Manager**.



Step	Action
73.	Click the **Close** button. 



Step	Action
74.	Click the **Control Panel** link. Control Panel
75.	Click the **Collapse** button.
76.	The **Training Administrators** may have additional responsibilities that fall within these highlighted areas.
77.	Click the **Advanced Learning** link. Advanced Learning
78.	**Advanced Learning** menu enables you to manage and track different training types. Major functions within this feature include Learning Plans, Skills, Credits and Training Offerings.
79.	Click the **Communications** link. Communications
80.	The **Communication** menu is the hub for all LearnCenter messages. The **Training Administrators** may be creating Skills that require notices and notifications to be managed in **Communications**.

Step	Action
81.	Click the **Enrollments** link. ▸ Enrollments
82.	The **Enrollments** section is where all User enrollments are managed which can include rosters, asset/materials and assessments.
83.	Click the scrollbar.
84.	Click the **ILT** link. ▸ ILT
85.	The **ILT** menu enables you to add and set up information for learning events that take place in physical locations with live instructors. You can also use this menu to add Assets, Instructors, Locations, and Equipment that are used for the ILT events.
86.	Click the **Reports** link. ▸ Reports
87.	The **Reports** menu can be used to access reports based on permissions.
88.	Click the scrollbar.
89.	Click the **Collapse** button.
90.	Click the **Home** button.
91.	Congratulations! You have completed this lesson. **End of Procedure.**

S2L1 - User Types: System Admins

Agency System Settings/Configuration

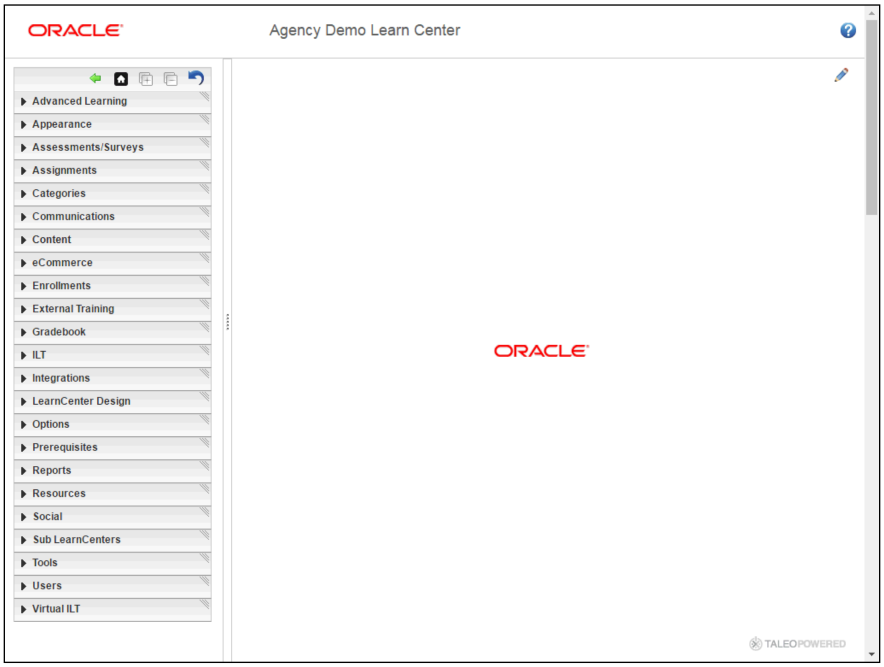
Section 2 - Lesson 1, Exercise 1 - **Agency System Settings/Configuration**

Procedure

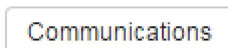
In this lesson, you will learn how to change the Agency Name (Title) in the Title Bar and add a System email address.

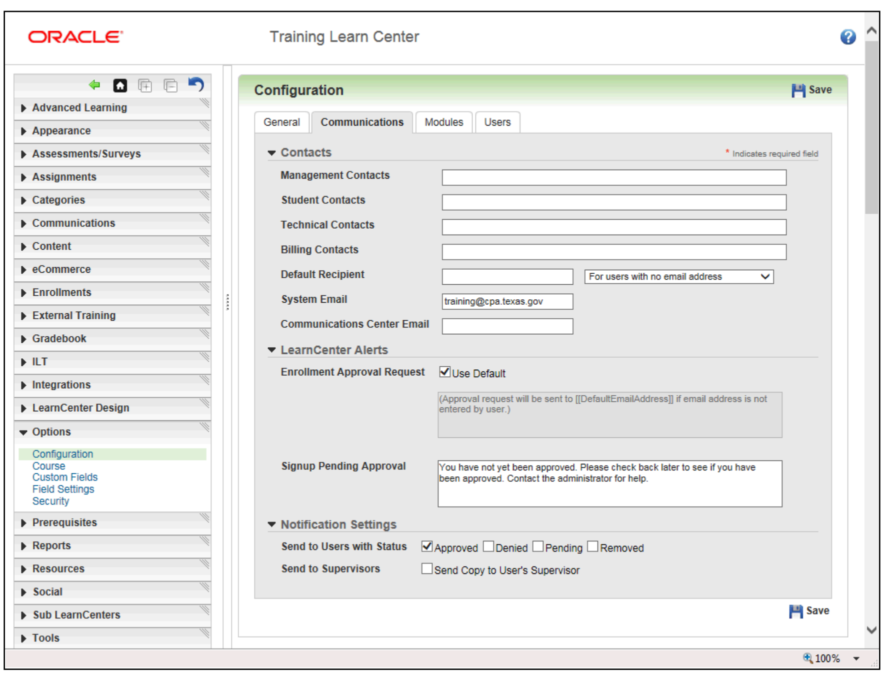
1) Enter the Agency Name - Training Learn Center

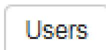
2) Enter the System email address - training@cpa.texas.gov

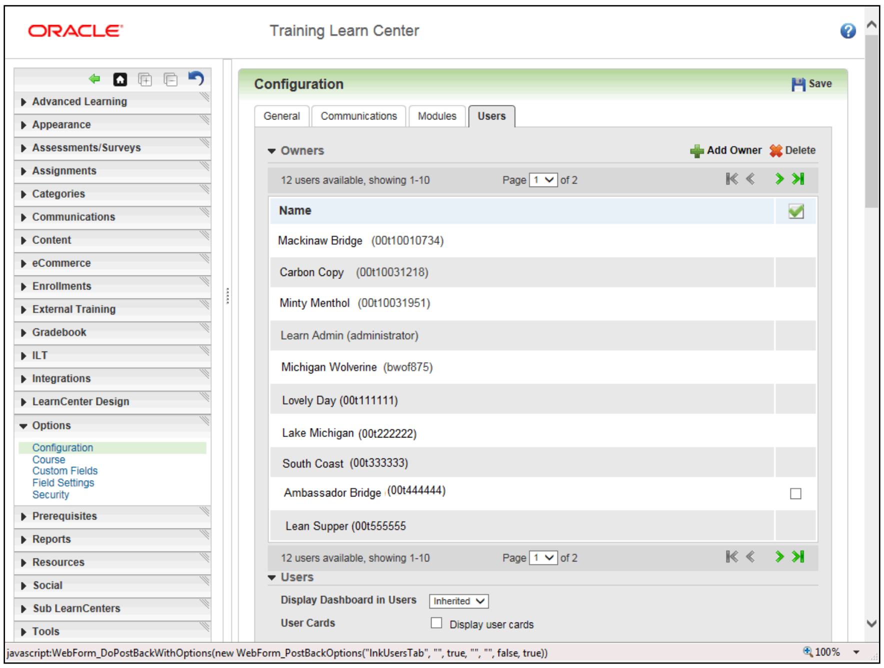


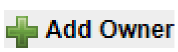
Step	Action
1.	Click the **Options** link. Options
2.	Click the **Configuration** link. Configuration
3.	This is the current name (title) for the LearnCenter that you are using.
4.	You are currently on the **General Tab**.
5.	You will remove the current name from the Name Field in the Details section. Click in the **Name** field. Agency Demo Learn Center
6.	To remove the current **Name** you can backspace or highlight the name and delete. Press **[Backspace]**.
7.	Enter the desired information into the field. Enter "**Training Learn Center**".
8.	Click in the **Short Description** field. Demonstration Only
9.	Press **[Backspace]**.
10.	Enter the desired information into the field. Enter "**This Learn Center is for training purposes only.**".

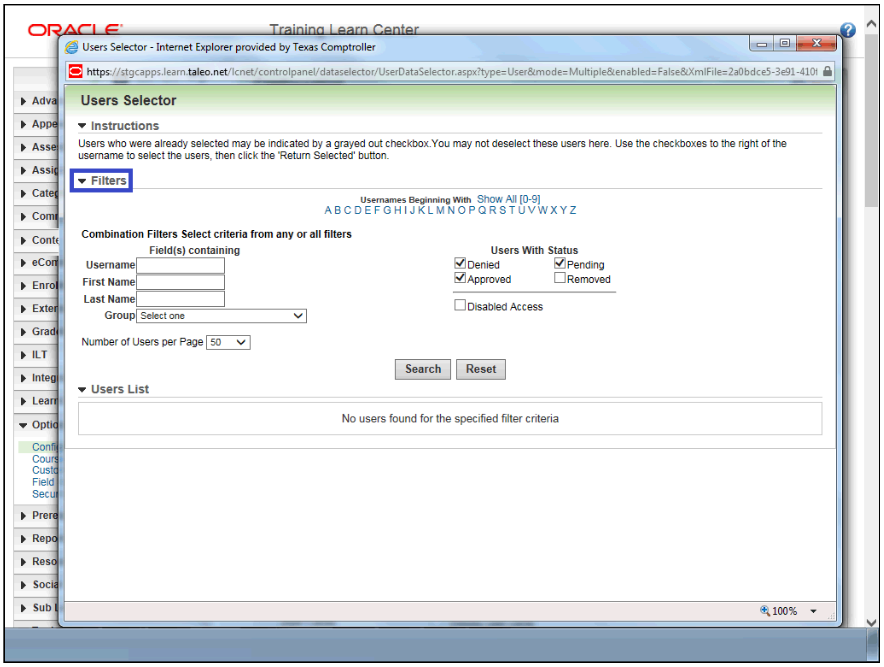
Step	Action
11.	It is best practice to **Save** before going to another tab. Click the **Save** button. 
12.	You will notice that the name on the page has not updated. Refresh the page to see the updated information. You can refresh by selecting another tab.
13.	Click the **Communications** tab. 
14.	You are going to change the system email address in the Contacts section. This email address will need to be your agency's help desk email address. This will not be maintained by CPA CAPPS. Enter the desired information into the field. Enter "**training@cpa.texas.gov**".
15.	Click the **Save** button. 
16.	The System Email is updated and you will also notice that title has been refreshed.

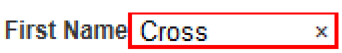
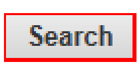
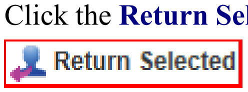


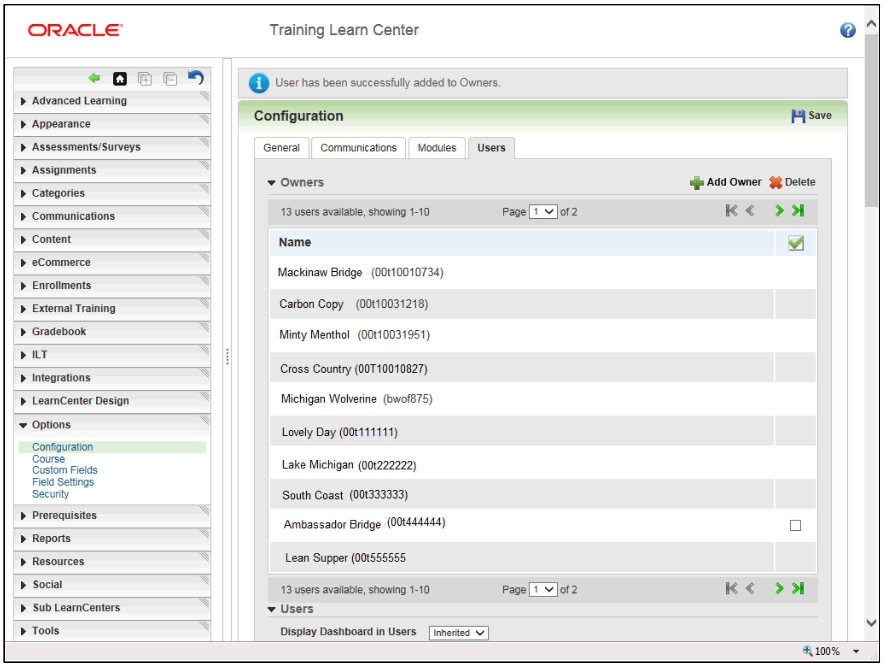
Step	Action
17.	Click the **Users** tab. 

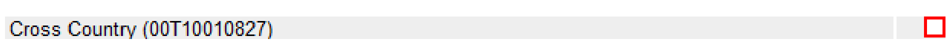
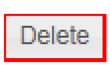


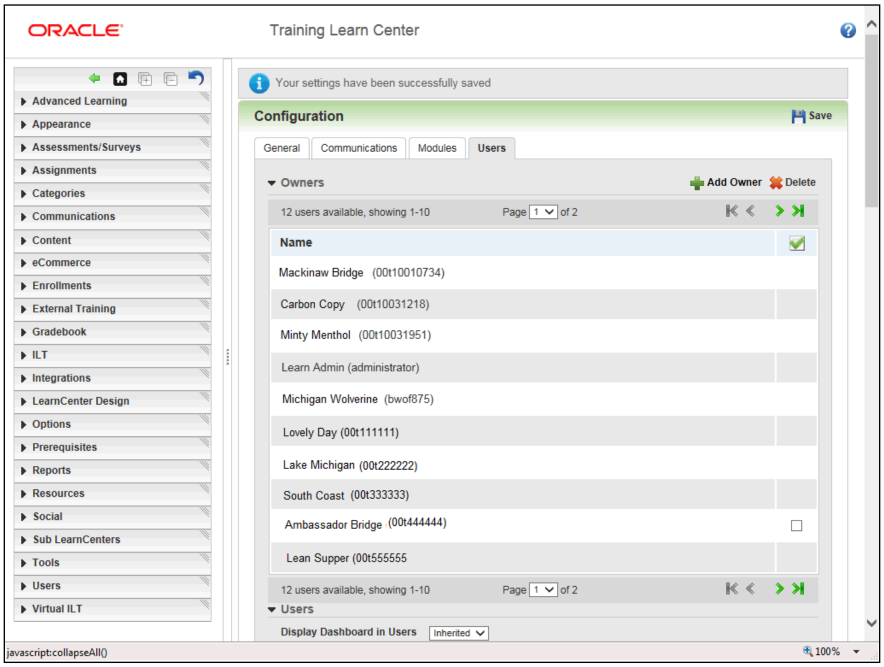
Step	Action
18.	You will add a co-owner for the LearnCenter. Click the **Add Owner** link. 



Step	Action
19.	You will use **Filters** to find and select a User using the First Name field. Enter the desired information into the **First Name** field. Enter "**Cross**". 
20.	Enter the desired information into the **First Name** field. Enter "**Cross**". 
21.	Click the **Search** button. 
22.	Click the **Select** option. 
23.	Click the **Return Selected** link. 
24.	Notice the selected Owner appears in the Owners list.



Step	Action
25.	Click the **Save** button. 
26.	The User is now saved as a LearnCenter Co-Owner.
27.	For training purposes, you will delete this User (Cross Country) from being a co-owner. Click the **Cross Country** option. 
28.	Click the **Delete** link. 
29.	Click the **Delete** button. 
30.	Click the **Save** button. 
31.	Click the **Collapse All** button. 



Step	Action
32.	Click the **Control Panel Home** button. 
33.	Congratulations! You have completed this lesson. **End of Procedure.**

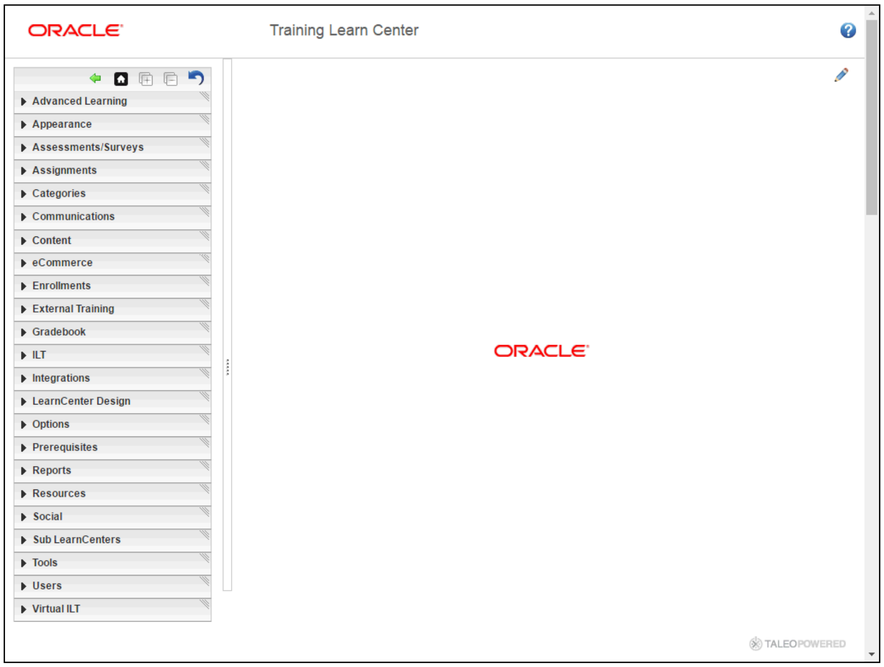
Field Settings

Section 2 - Lesson 1, Exercise 2 - **Field Settings**

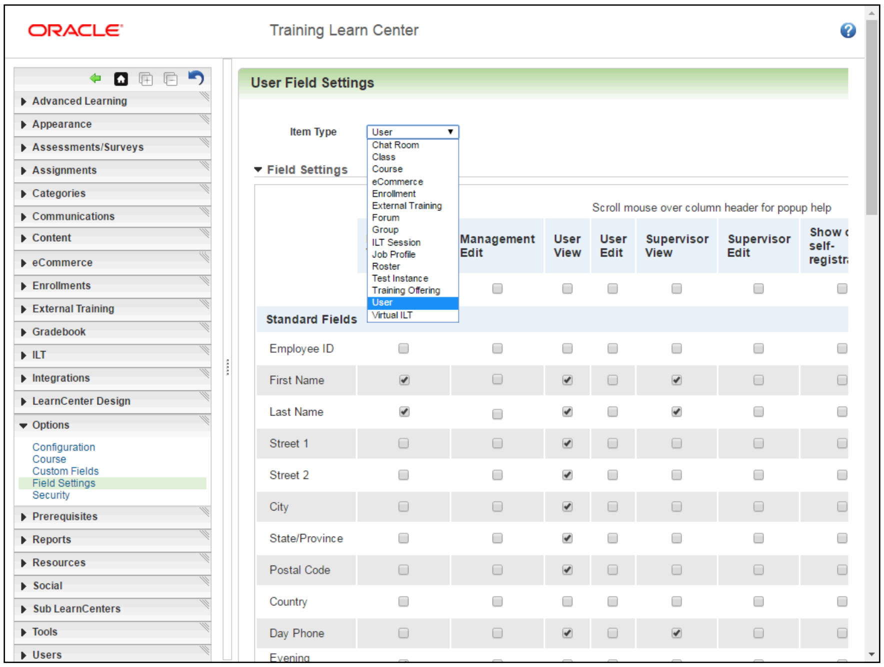
Procedure

In this lesson, you will learn how to change the view/edit Field Settings for Item Types.

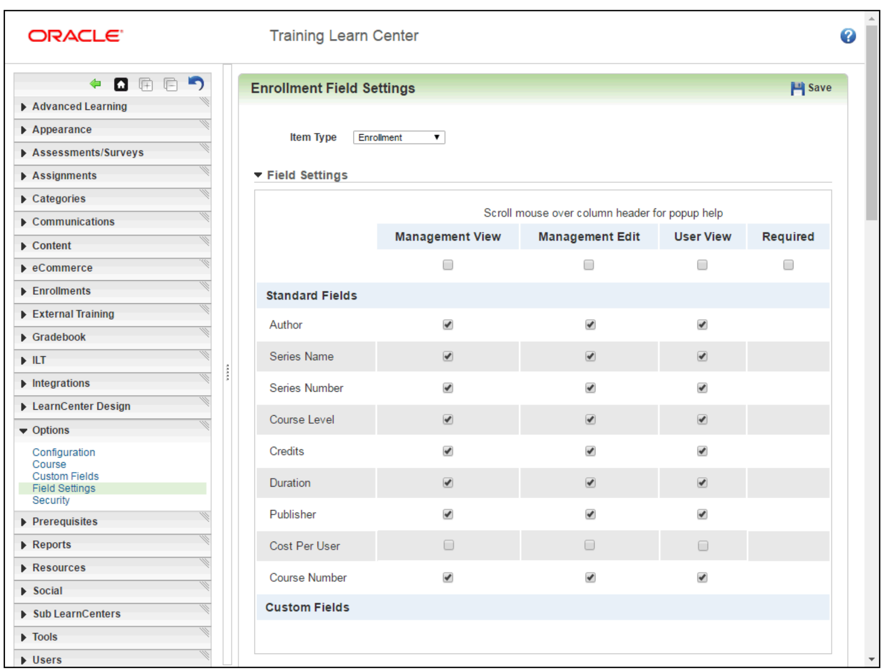
You will select the Item Type - Enrollment and deselect Credits from being viewed/edited by Users.



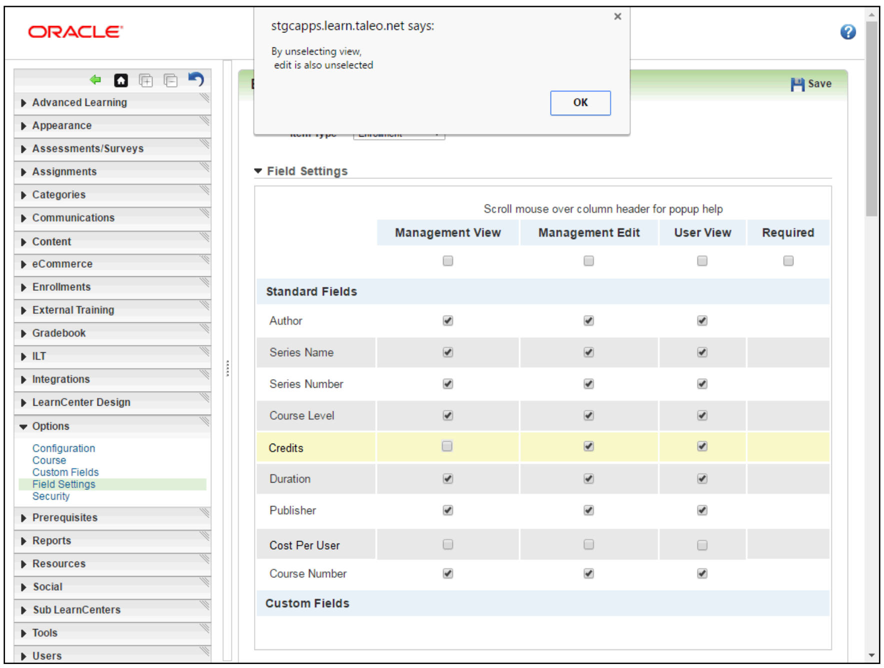
Step	Action
1.	Click the **Options** link. Options
2.	Click the **Field Settings** link. Field Settings
3.	The **User Field Settings** page is used to determine what information can be viewed according to the Item Type. System Admins can manage what information should be viewed for any Item Type.
4.	Notice the column headings according to the type of User.
5.	Please note that the **Edit** columns should not be changed. Only the **View** columns can be changed as needed.
6.	The Show self-registration column will not be used.
7.	This page lists all **Standard fields** and any **Custom fields** that are included in the LearnCenter.
8.	These checkboxes will select everything listed in a specific column.
9.	Click the **Item Type** dropdown button to activate the menu.

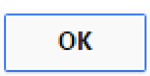


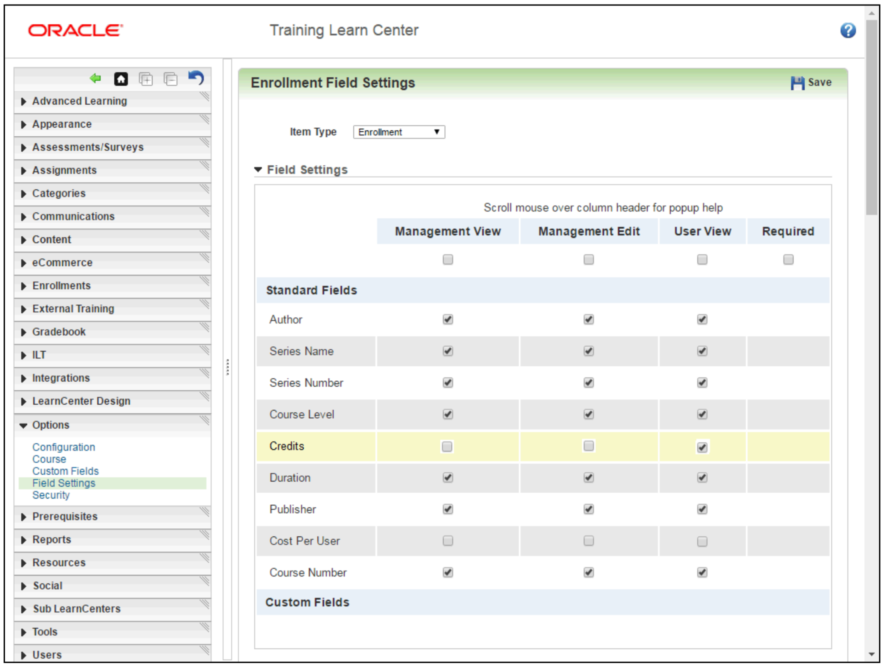
Step	Action
10.	Click the **Enrollment** list item. Enrollment



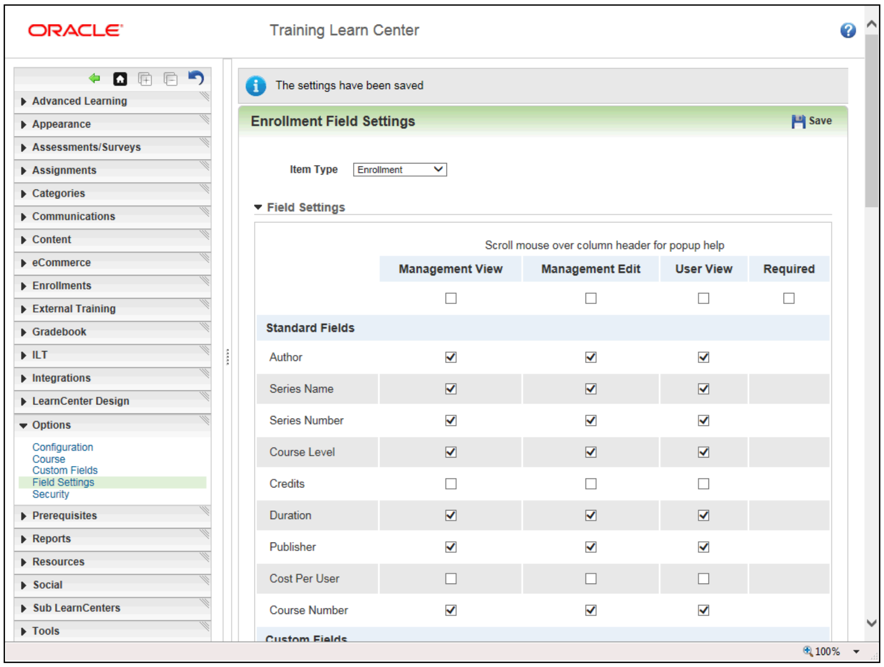
Step	Action
11.	Unselect the option to have **Management** view **Credits**. This will automatically unselect the option to Edit. Click the **Checkbox** option. 



Step	Action
12.	Click the **OK** button. 



Step	Action
13.	Unselect the option for a **User** to view **Credits**. Click the **Checkbox** option. 
14.	Click the **Save** button. 



Step	Action
15.	Click the **Collapse All** button.
16.	Click the **Control Panel Home** button.
17.	Congratulations! You have completed this lesson. **End of Procedure.**

Managing User Accounts

Section 2 - Lesson 1, Exercise 3 - **Managing User Accounts**

The User list in the Users section displays the results of the searches you perform using the Filters section on the Users page. This is the central hub for Administrators who need to view information about particular Users.

Based on assigned User Permissions, Administrators can also perform a variety of User-related tasks from the User section, such as updating User Profile information, mapping Users to Enrollments and Learning Plans or similar learning items or changing a User's membership status.

User Action List

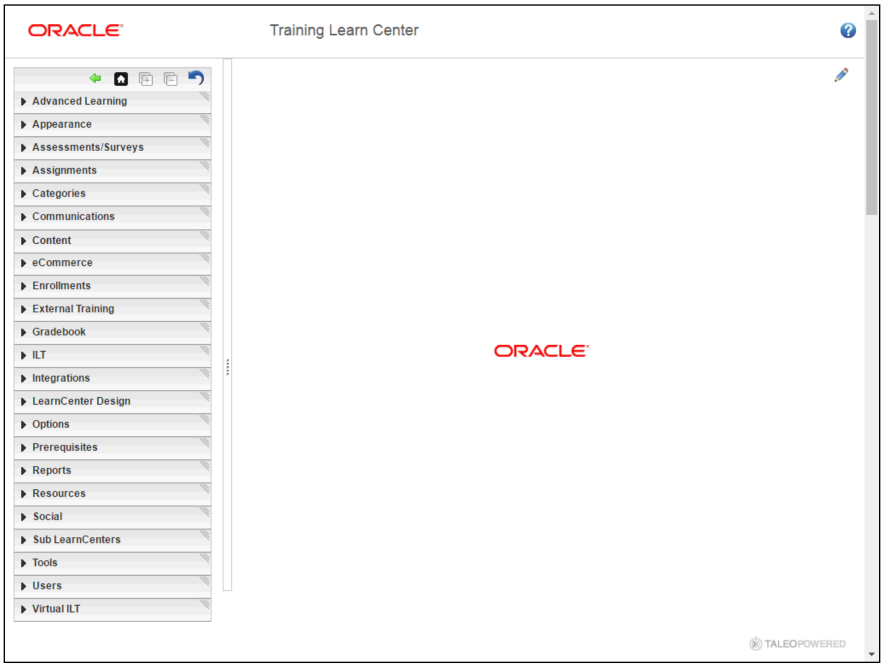
Action	Description
	Click this display a User's calendar.
	Click to view all items associated with the user, such as Enrollments for which the user is either a participant or admin, Courses, Skills, Certification Profiles, Assignments, Appraisals, Goals, Credits, and Learning Plans. A window opens displaying all items types. You can display just certain items types by selecting the appropriate option from the drop-down list in the Actions section.
	Click this to view and edit a User Permissions. See Assigning User Permissions to Users for instructions. See User Permissions for additional information about User Permissions.
	Click this to view or edit the User Profile. This button is only visible if you have been granted the View User Info User Permission.
	Click this button to add User Performance Notes for a user.
	Click this and then select an item from the Actions drop-down list in the Users section to perform various actions against the user.

Procedure

In this lesson, you will learn how to use filters, review account profiles, reenable users, and apply actions.

You will work with the User Profile and Permissions for the following Users:

1) Poppy Seed
2) Carbon Copy

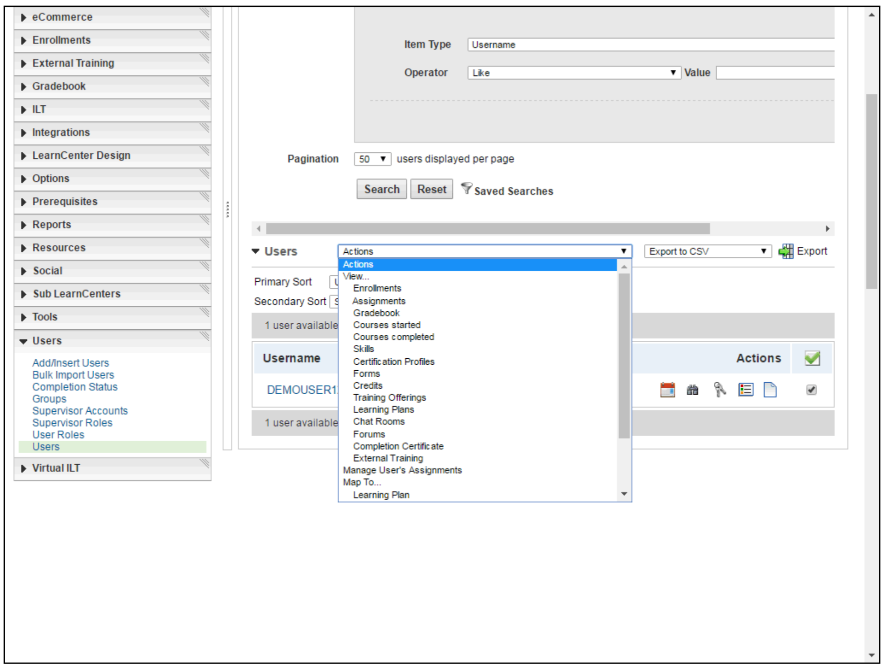


Step	Action
1.	Click the **Users** link. Users
2.	Click the scrollbar.
3.	Click the **Users** link. Users
4.	The **Users** page lists five users according to the default filter that is applied. Let's take a look at the **Filters.**
5.	The Filters may be collapsed or expanded depending on how you last left this page. In this case, you will expand. Click the **Filters** pointer.
6.	The **Filters** default shows that the list of Users are in a status of **Denied, Pending,** or **Approved.**

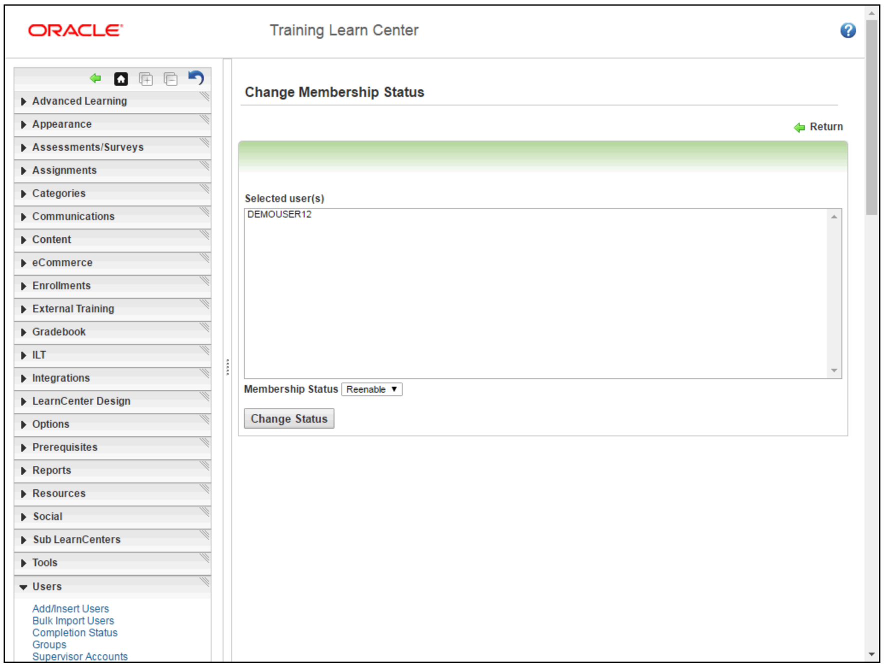
Step	Action
7.	**Status Definitions:** **Approved** - Users who have been approved to use the LearnCenter. **Removed** - Users who have been removed from the LearnCenter. Their accounts are not active and they cannot log in. This status should be used when a User has left the company or is no longer accessing the LearnCenter. The status of **Approved** and **Removed** are **assigned via a nightly interface from CAPPS HR/Payroll**. More on Status Definitions....
8.	**Statuses cont'd** **Disabled Access** - Approved Users who have exceeded the maximum number of failed log in attempts based on the settings for the LearnCenter password lockout feature. **Denied Access (not being used)** - Users where access to the LearnCenter is denied temporarily. These accounts are locked until the Administrator changes the status to Approved. **Pending (not being used)** - Users who are awaiting approval to use the LearnCenter. Their accounts are in a non-active state and these Users cannot log in.
9.	Let's add **Users** that have a status of **Removed** to the filters. Click the **Removed** list item. Removed
10.	To add Removed to the list of statuses, you must select the **Add** button and Removed will move over to the box on the right. Click the **Add >>** button. Add >>
11.	Click the **Search** button. Search
12.	The results of this search are at the bottom half of the page. Click the scrollbar.
13.	Note that the previous list had 5 users and now it contains 8.

Step	Action
14.	Click the scrollbar.
15.	You will not need to work with Users that have a status of Removed at this time so you will remove this status. Click the **Removed** list item. Removed
16.	Click the **<< Delete** button. << Delete
17.	You can also search for Users using the first letter of their Username. Click the **N** link. N
18.	Click the **Search** button. Search
19.	Scroll to the bottom to see your results. Click the scrollbar.
20.	There are No records found using the Username begins with "N" search.
21.	Click the scrollbar.
22.	Let's reset the Search. Click the **Reset** button. Reset
23.	Click the scrollbar.
24.	You are back to the 5 users with the default status as before.
25.	Click the scrollbar.
26.	The **Disabled Access** option will list all users that have a disabled account **(LOCKED OUT)**. Click the **Disabled Access** option.
27.	There is no need to select Search. The results will appear at the bottom of the page. Click the scrollbar.

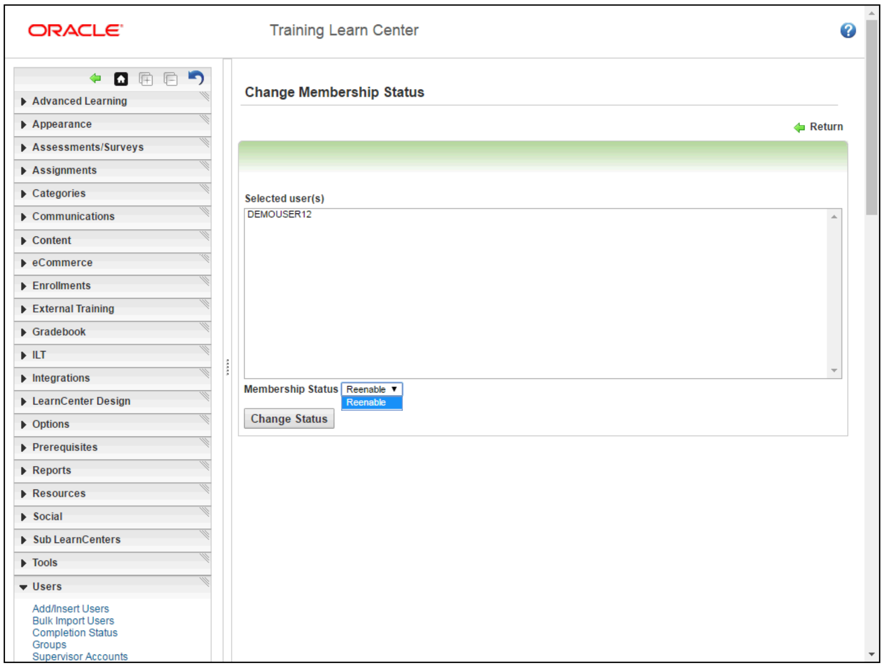
Step	Action
28.	This User is locked out and you need to reenable their access. Click the **Select** option. 
29.	Click the **Actions** dropdown button to activate the menu. 



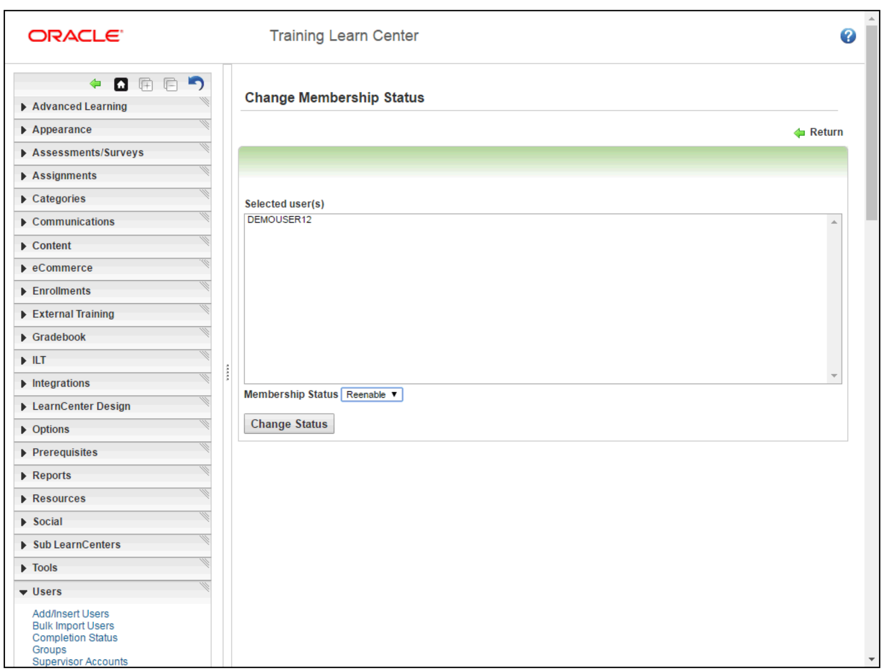
Step	Action
30.	There are various Actions available and you will need to scroll to see all of them. Click the **Actions** scrollbar.
31.	Click the **Change Membership Status** list item. Change Membership Status



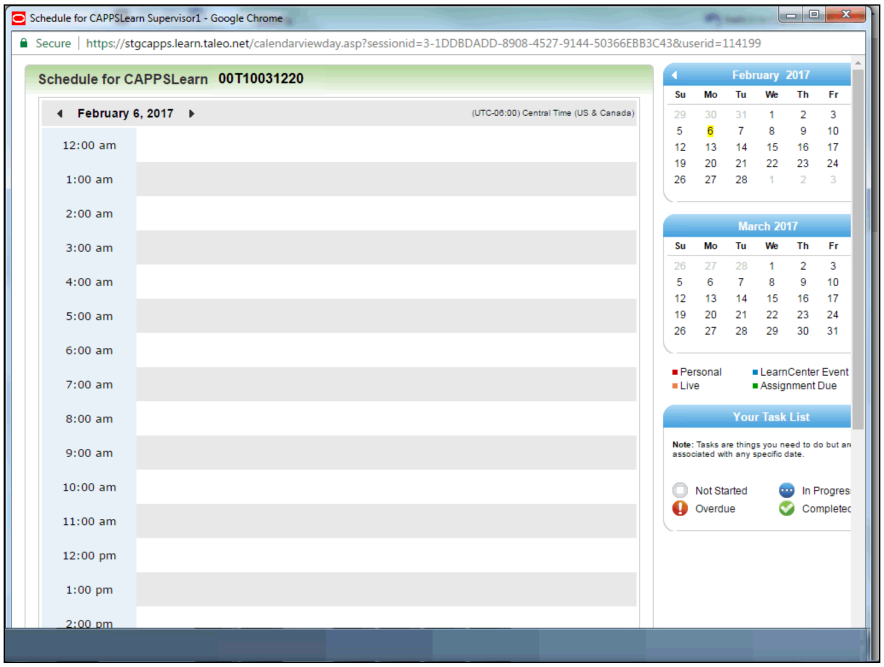
Step	Action
32.	Since this User is disabled, you will **Reenable** their Membership status so that they can continue to use CAPPS Learn. Click the button to the right of the **Membership Status** field. 



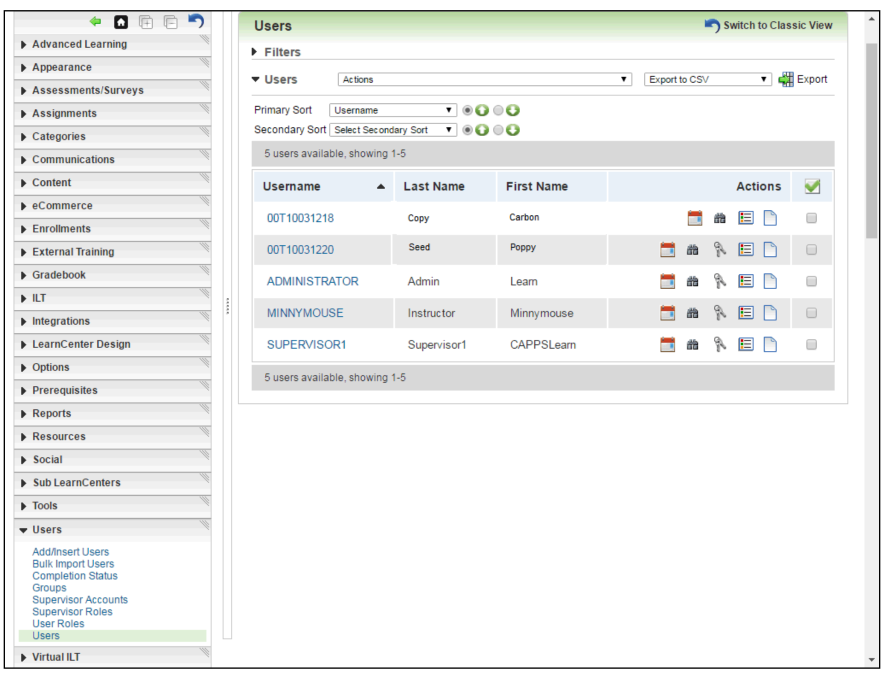
Step	Action
33.	Click the **Reenable** list item. Reenable



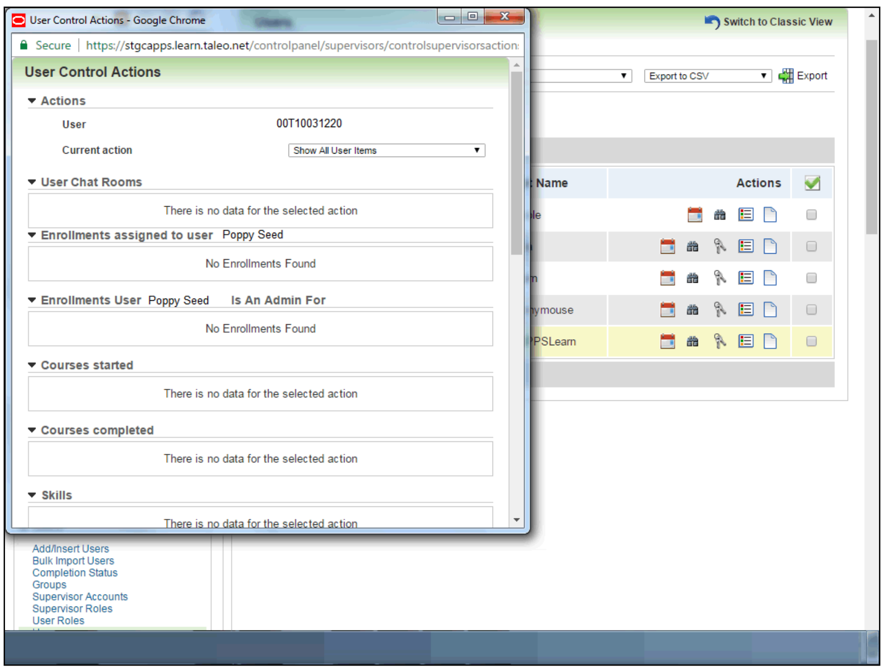
Step	Action
34.	In order for the changes to take effect, Click the **Change Status** button. Change Status
35.	Click the **Return** link. Return
36.	You have finished working with Disabled Users and now you will remove the Disabled filter. All of the previous users will appear at the bottom of the page as before. Click the **Disabled Access** option.
37.	Collapse the **Filters** in order to easily work with the Users listed. Click the **Filters** pointer.
38.	Let's walk through the **Actions** and **Description** icons for User - Poppy Seed.
39.	The **Calendar** icon displays a User's calendar. Click the **Calendar** link.



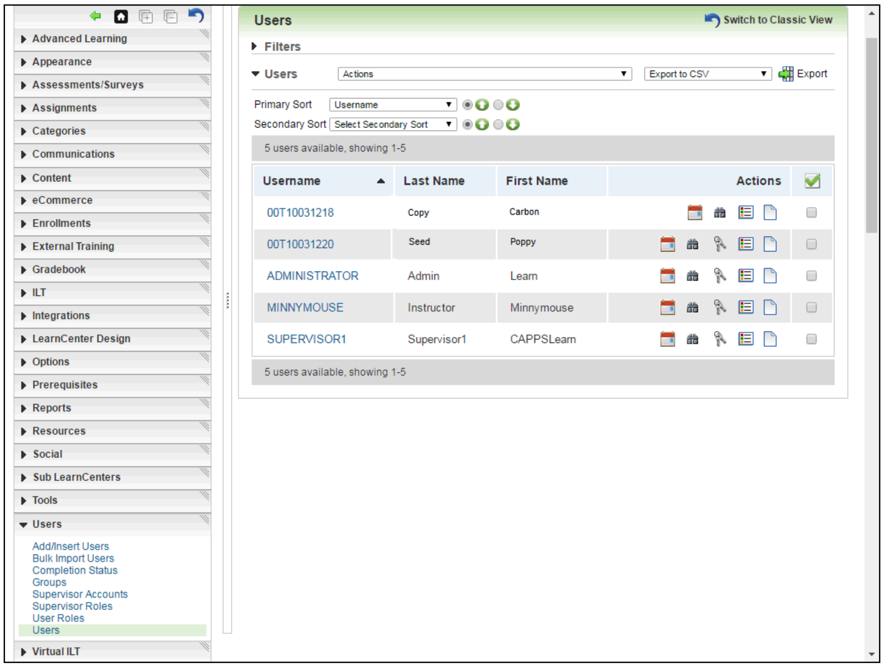
Step	Action
40.	Click the **Close** button. 



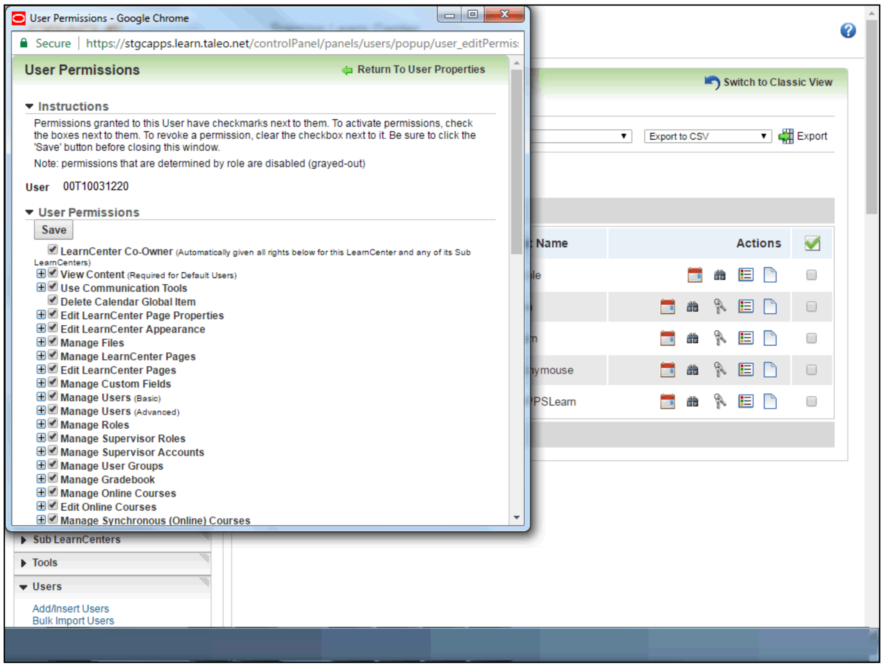
Step	Action
41.	The **View** icon allows you to view all items associated with the User, such as Enrollments, Courses, Skills, etc. Click the **View** link. 



Step	Action
42.	Click the scrollbar.
43.	Click the **Close** button. 

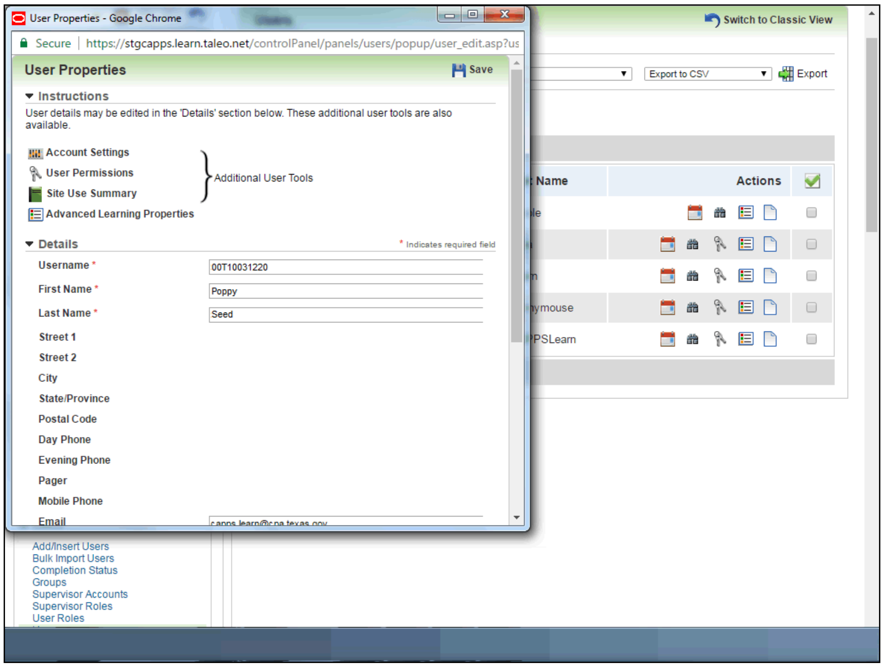


Step	Action
44.	The **Permissions** icon allows you to view and edit **User Permissions**. Click the **Permissions** link. 

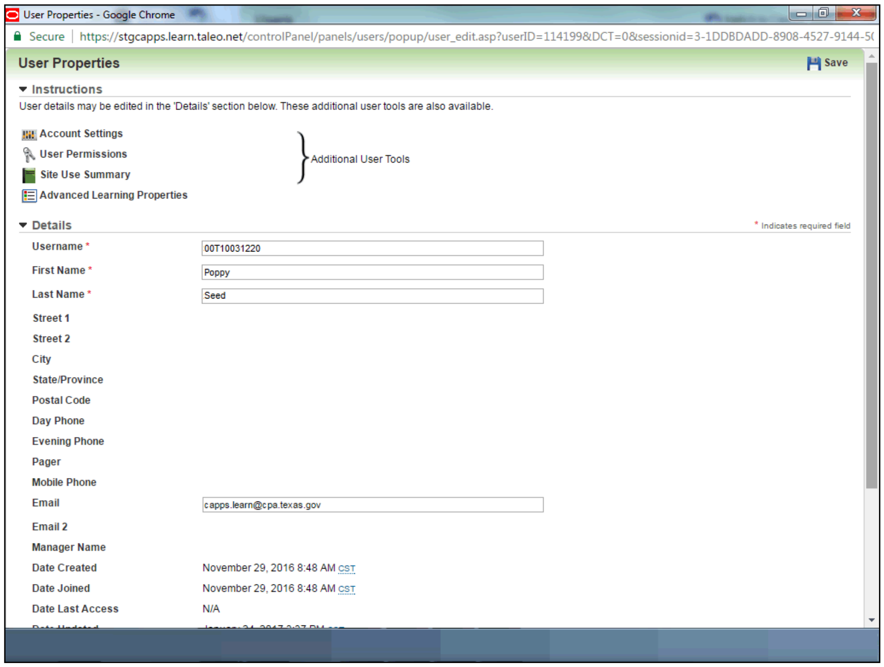


Step	Action
45.	Let's look at the **User Permissions** for View Content**.** Click the **Plus sign** object.
46.	The checkbox next to View Content is checked and automatically selects all subtopics under it. There are a few ways to deselect the checked options. Click the **Checkbox** option.
47.	To check all under View Content, Click the **Checkbox** option.
48.	**Note:** The selections on this page are for training purposes only. **All selections may not be available or used outside of training.**

Step	Action
49.	Now you will deselect only a few of the permissions. Reviews won't be used within CAPPS Learn so you will remove this option from the User Permission. Click the **Insert Reviews** option.
50.	Click the **Edit Reviews** option.
51.	Click the **View Reviews** option.
52.	Click the **Save** button. Save
53.	Go back and see the changes. Click the **Plus sign** object.
54.	Note the selected View Content User Permissions for Reviews are no longer assigned.
55.	Click the **Return to User Properties** link. Return To User Properties

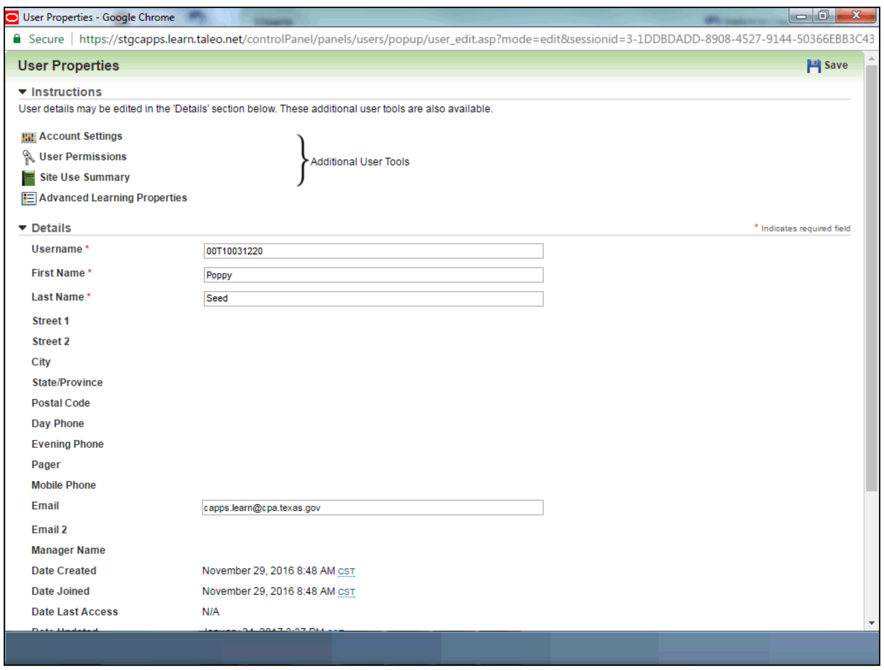


Step	Action
56.	Click the **Maximize** button. 
57.	Click the scrollbar.
58.	This area provides details on access granted to the User and the User's last access.
59.	Click the scrollbar.

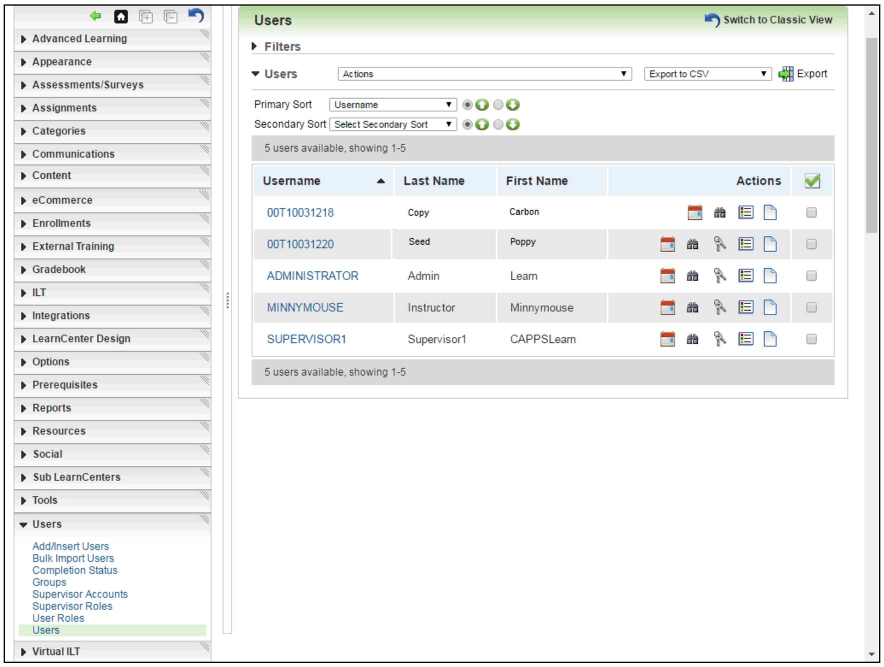


Step	Action
60.	Click the **Account Settings** link. Account Settings
61.	The **User Account Settings** page is where your account settings and passwords exist for your LearnCenters. Password resets are handled by your system security team or system administrator.
62.	The **Admins** will not use the **Account Settings** section.
63.	Click the **Return to User Properties** link. Return To User Properties
64.	Click the **Site Use Summary** link. Site Use Summary
65.	Click the **Return to User Properties** link. Return To User Properties
66.	Click the **Advanced Learning Properties** link. Advanced Learning Properties

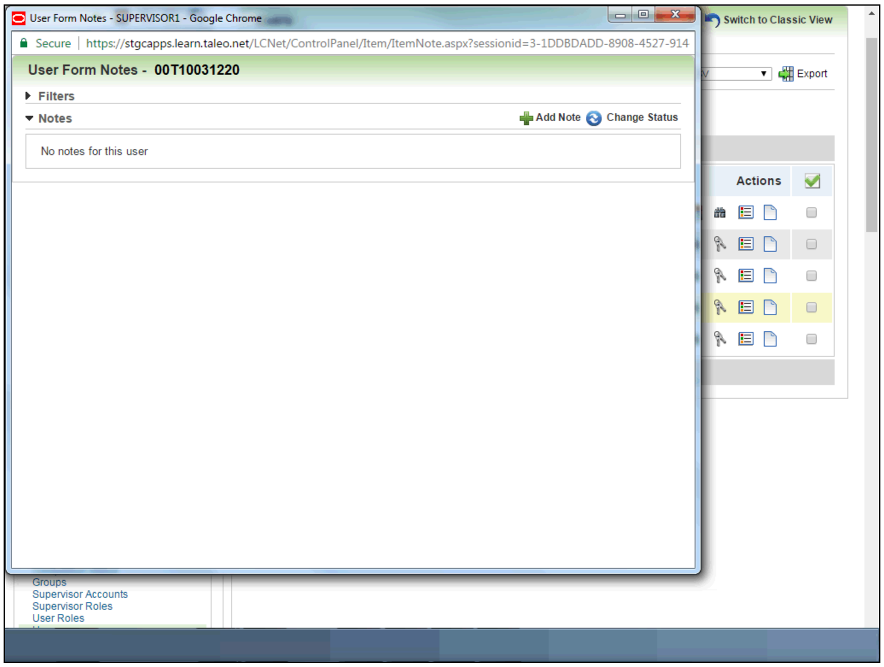
Step	Action
67.	You can view the User **Mappings** options. Click the button to the right of the **View** field. ▼
68.	This screenshot shows you the different views that are available. You will not select any at this time.
69.	Click the **Return to User Properties** link. Return To User Properties



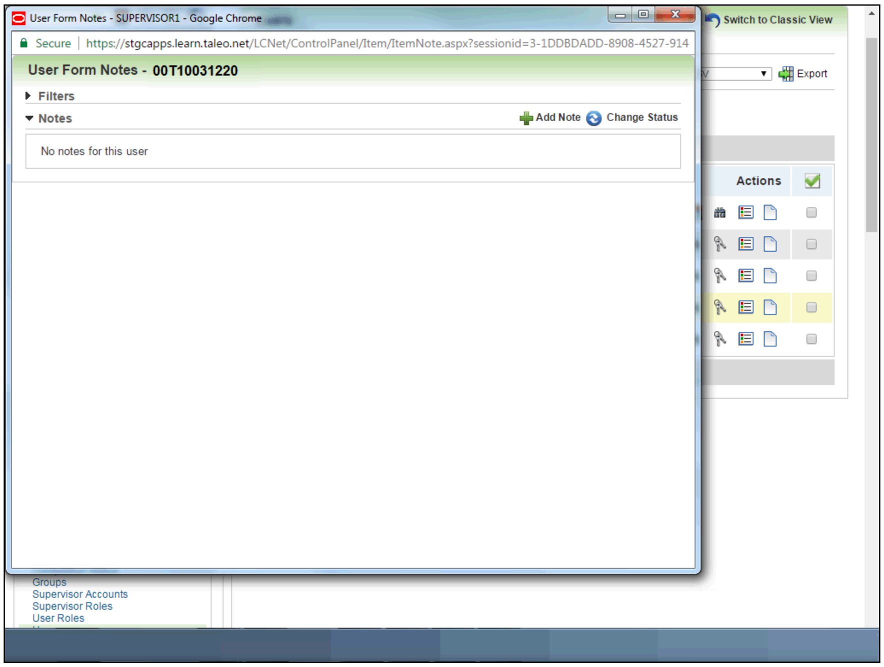
Step	Action
70.	Click the **Close** button.



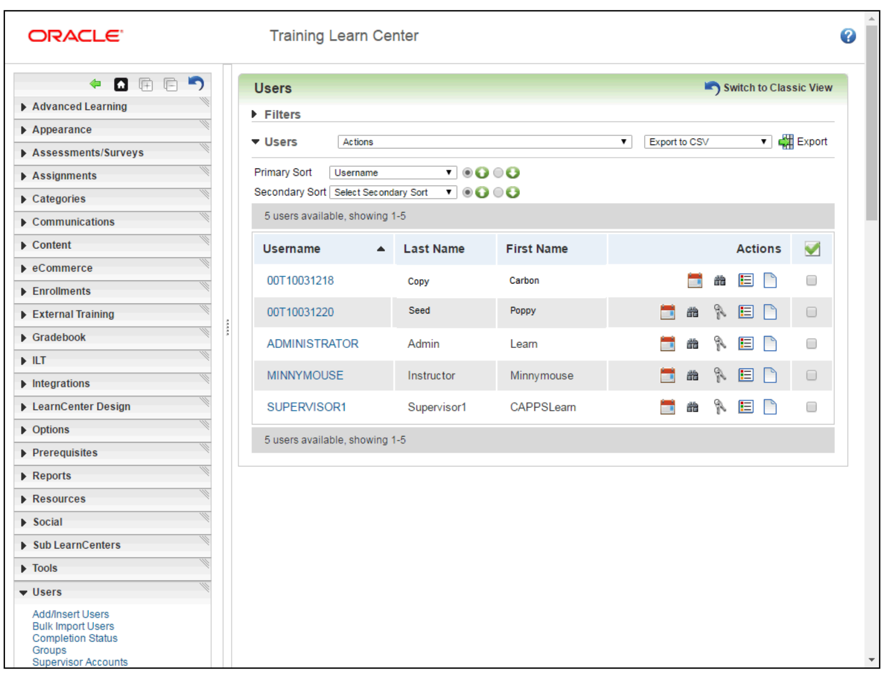
Step	Action
71.	The **Note** icon allows you to enter notes and/or attach a document to a User. This is a reportable field so please do not enter any sensitive information. Click the **Notes** link. 



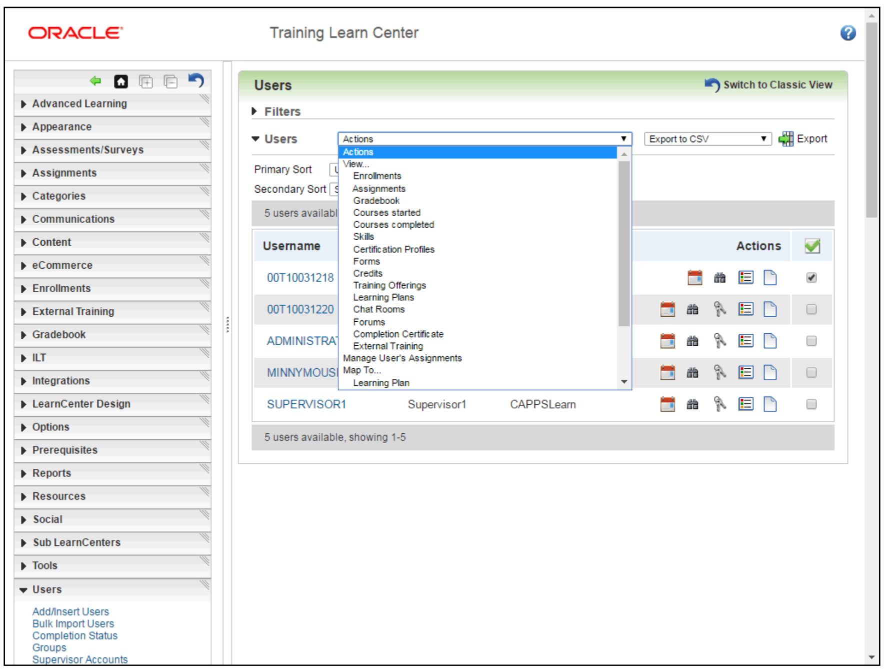
Step	Action
72.	Click the **Add Note** button. Add Note
73.	You have the option of entering notes and attaching a document. Click the **Return to Note List** link. Return to Note List



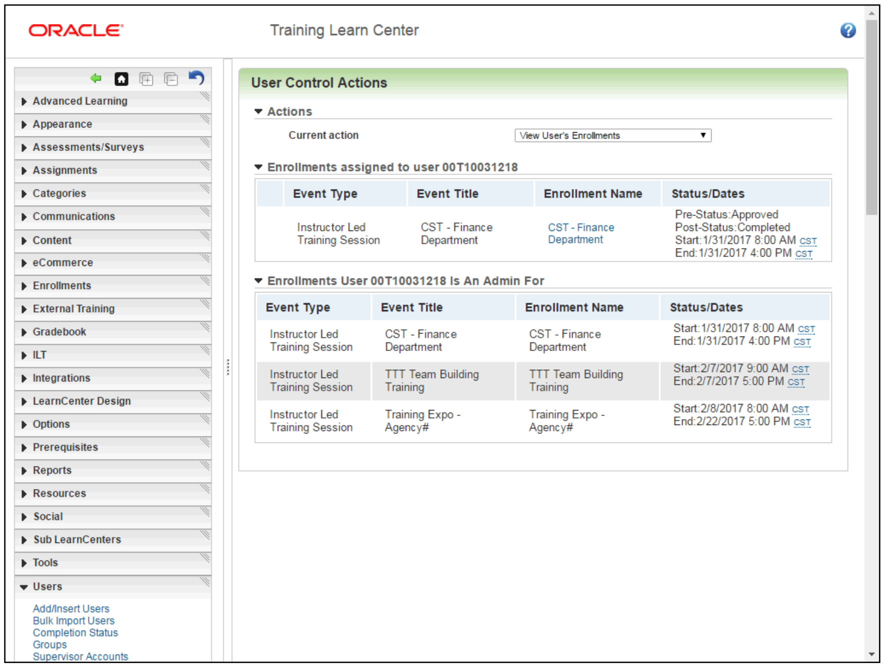
Step	Action
74.	Click the **Close** button. 



Step	Action
75.	Now you will work with the **Actions List** for User - Carbon Copy. You must select the User to perform the Action. Click the **Selection for User - Carbon Copy** option.
76.	Click the button to the right of the **Actions** field. ▼
77.	Various tasks that can be performed are listed.



Step	Action
78.	Click the **Enrollments** list item. Enrollments



Step	Action
79.	The Enrollments for Carbon Copy are listed. Click the scrollbar.
80.	If you need to get back to the User List, Click the **Users** link. Users
81.	Click the **Collapse** button.
82.	Click the **Home** button.
83.	Congratulations! You have completed this lesson. **End of Procedure.**

Creating a Dynamic Group & Mapping Users

Section 2 - Lesson 1, Exercise 4 - **Creating a Dynamic Group & Mapping Users**

The Dynamic Groups feature enables you to automate the process of assigning Users to Groups, Learning Plans, and Skills based on specific User criteria you pre-select. As Users are added to the LearnCenter, or as their User Profile information changes (new position, the process of adding them to or removing them from appropriate Groups and assigning them to appropriate training can be handled automatically by the LearnCenter.

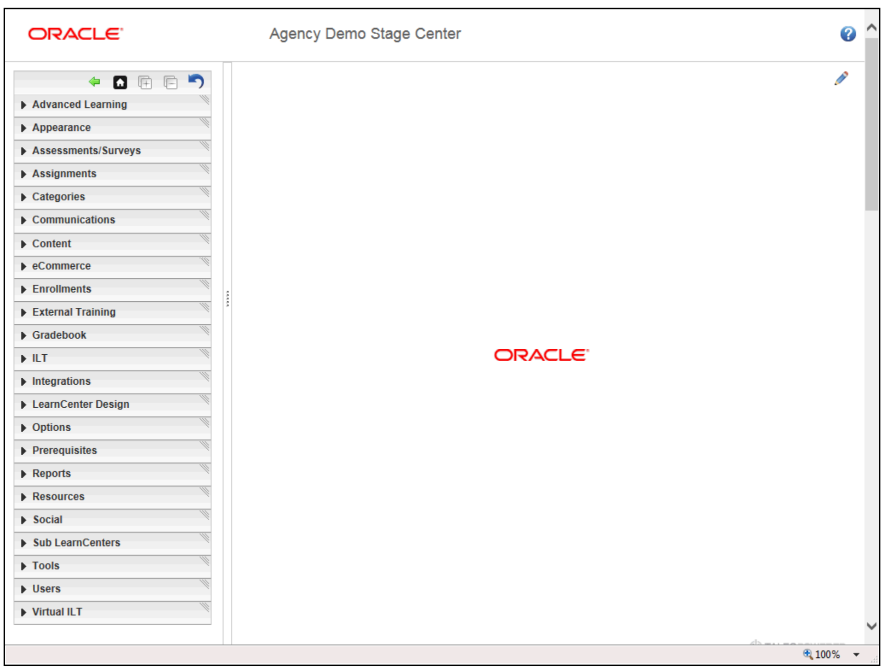
Procedure

In this lesson, you will learn how to create a Dynamic Group and Map a User to the Group.

1) The Dynamic Group name: Training Group

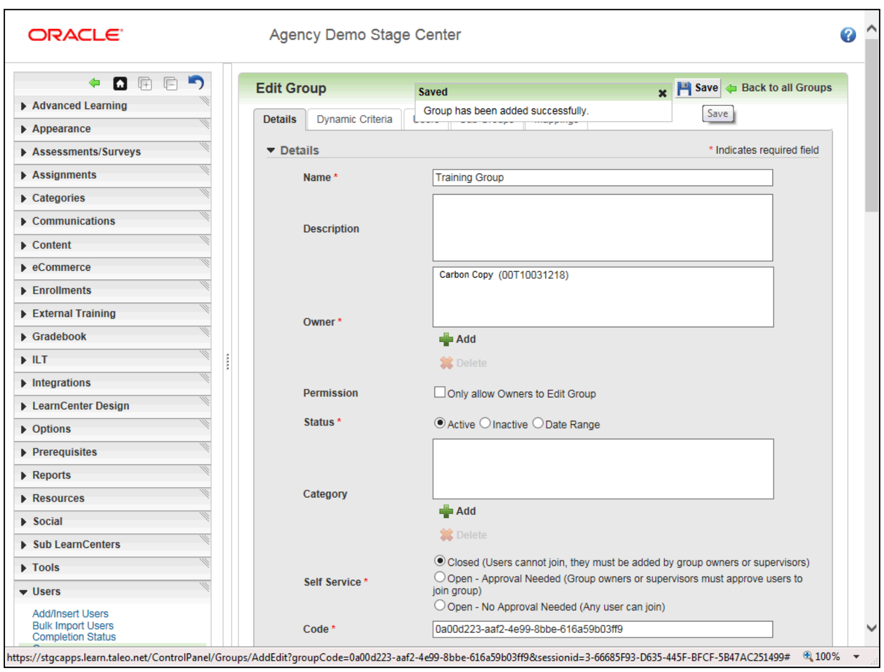
2) The User Role: Learn_INSTRUCTOR

3) The First Name of User added to the Dynamic Group: Minty



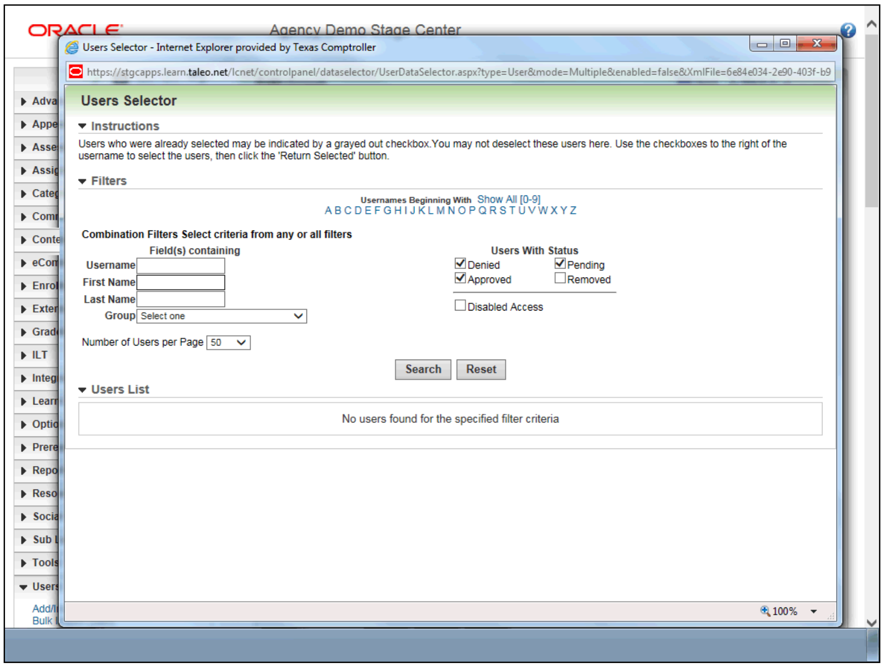
Step	Action
1.	Click the **Users** link. Users
2.	Click the scrollbar.
3.	Click the **Groups** link. Groups
4.	There is one group already existing named - **Instructor Groups**. The Instructor Group has a total of 3 Users.

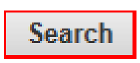
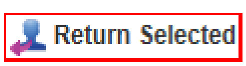
Step	Action
5.	You will add another Group. Click the **Add Group** link. Add Group
6.	Enter the desired information into the **Name** field. Enter "**Training Group**". *
7.	You have an option of entering a **Description** as well. For training purposes, you will skip this option.
8.	The **Owner** field will default. If an Owner needs to be added or deleted you can use the applicable buttons.
9.	Click the **Save** button. Save

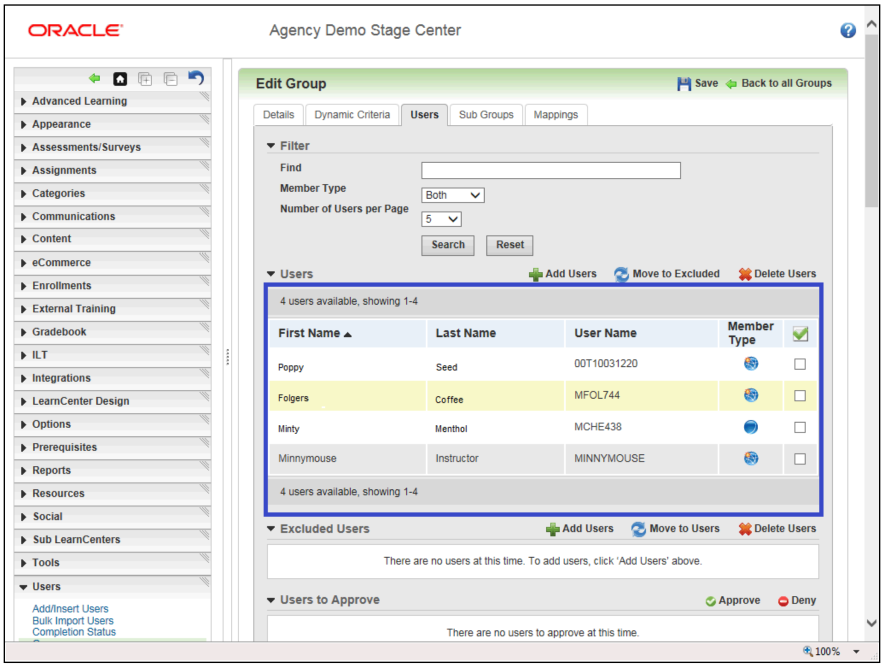


Step	Action
10.	Click the **Dynamic Criteria** link. Dynamic Criteria

Step	Action
11.	The Dynamic User Criteria tab is used to establish whether the group will be Dynamic or Static. If this page is not filled in, the group will automatically be Static. The only way to make it Dynamic is by filling out this page.
12.	In this example, we will be working with the Users.
13.	Click the **Users** list item. Users
14.	Click the **Field Name** list. Field Name [select field]
15.	Click the **User Role** list item. User Role
16.	The Value field automatically populated but the down arrow can be used to select another User Role. You will be using the value Learn_Instructor.
17.	Click the **Preview Results** button. Preview Results
18.	Click the **Dynamic User Results** pointer.
19.	There are 3 Users that have the User Role - Learn_Instructor.
20.	Click the **Save** button.
21.	Click the **Users** link. Users
22.	You are going to Add an additional User to the Dynamic Group. Click the **Add Users** button. Add Users



Step	Action
23.	Enter the desired information into the **First Name** field. Enter "**Minty**". 
24.	Click the **Search** button. 
25.	Click the **Action** option. 
26.	Click the **Return Selected** link. 



Step	Action
27.	Now there are 4 Users that are in the Dynamic Group. Click the **Save** button. Save
28.	Click the **Back to all Groups** link. Back to all Groups
29.	The Training Group is added to the list of Groups.
30.	Click the **Control Panel Home** button. 
31.	Congratulations! You have completed this lesson. **End of Procedure.**

Validating Role Config & Security Permissions

Section 2 - Lesson 1, Exercise 5 - **Validating Role Config & Security Permissions**

LearnCenter User permissions are the keys to the LearnCenter. As an Administrator, you have the authority to grant or deny User permissions for other users. When you grant a user a permission, you are giving that user the right to access functionality, fields, or pages to which other users may not have access.

Denying permission takes away that user's right to access that information. Some fields and functionality are tied to User permissions, and if a user does not have those permissions that user will not be able to access that field or functionality.

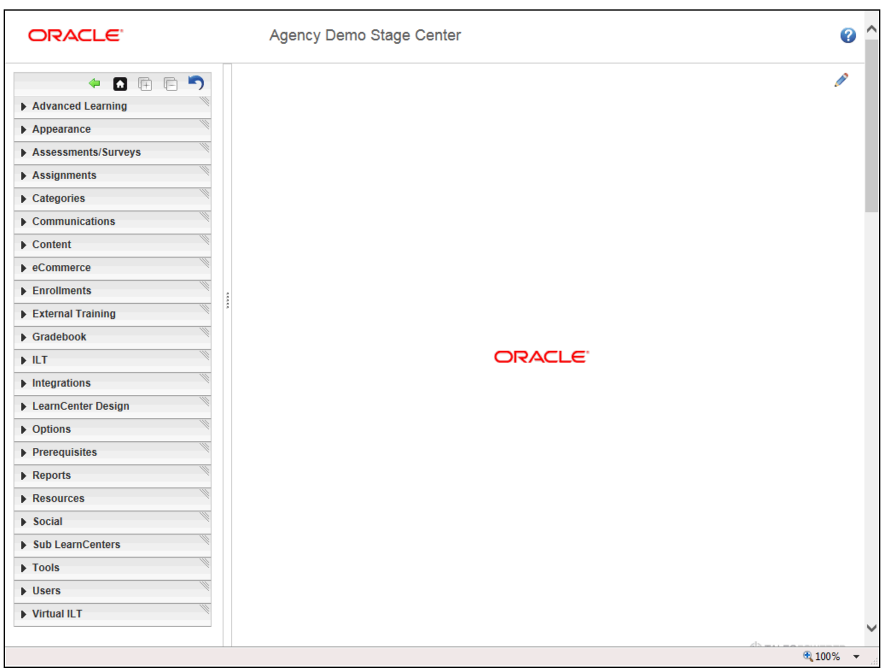
Procedure

In this lesson, you will learn how to map a User to a role and view/edit role permissions.

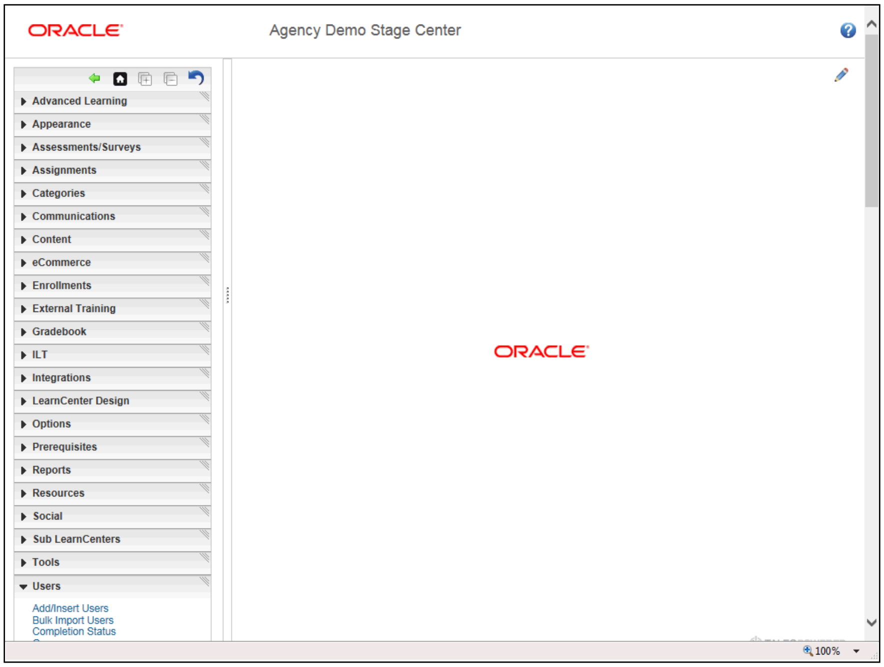
1) User Role: Learn_INSTRUCTOR

2) Adding User: Poppy Seed

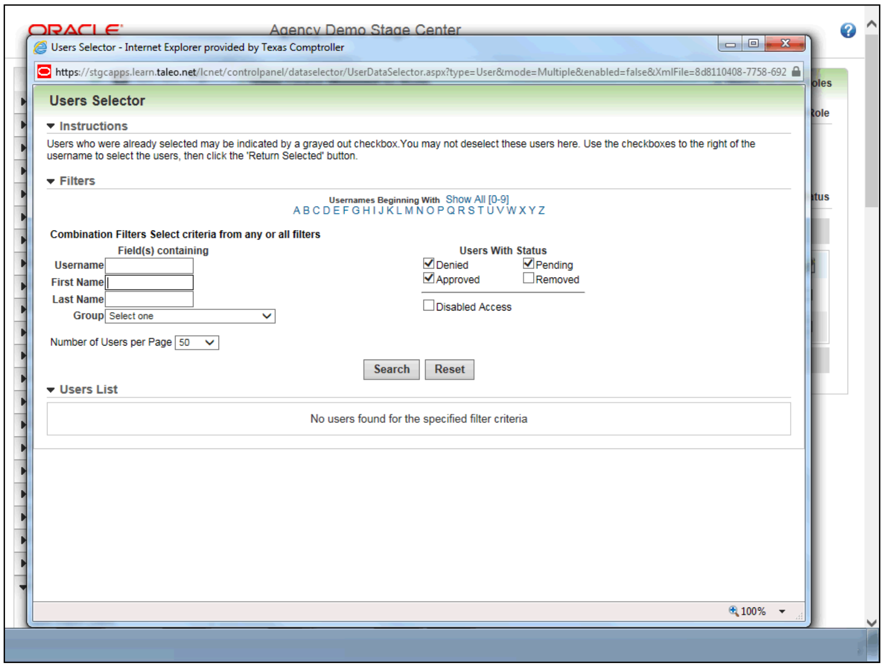
Step	Action
1.	**NOTE:** Delivered baseline roles should not be changed due to the custom interface. Before making modifications to permissions, it is recommended that you consult with CPA first, as it may impact Users access.



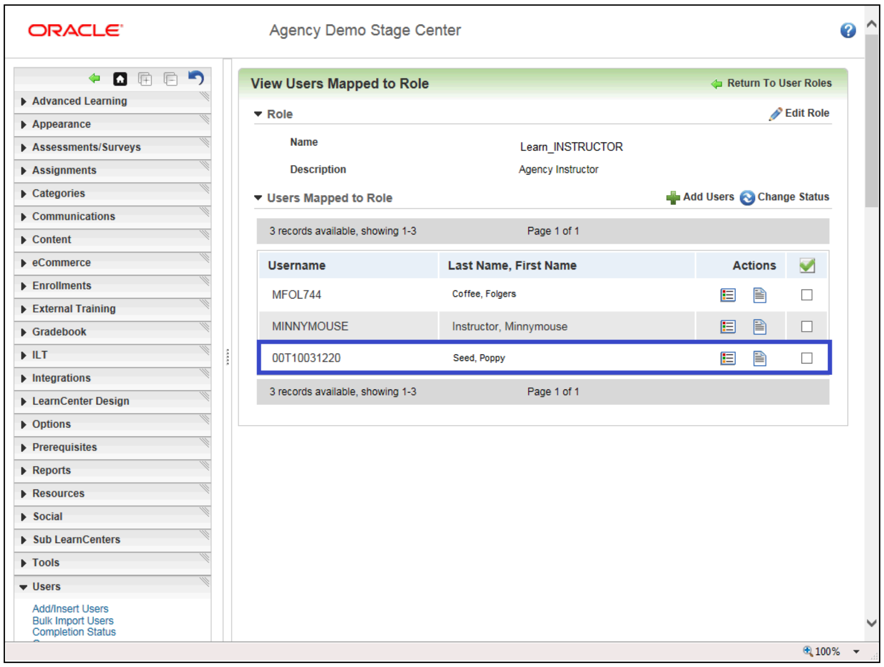
Step	Action
2.	Click the **Users** link. Users

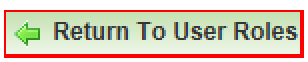


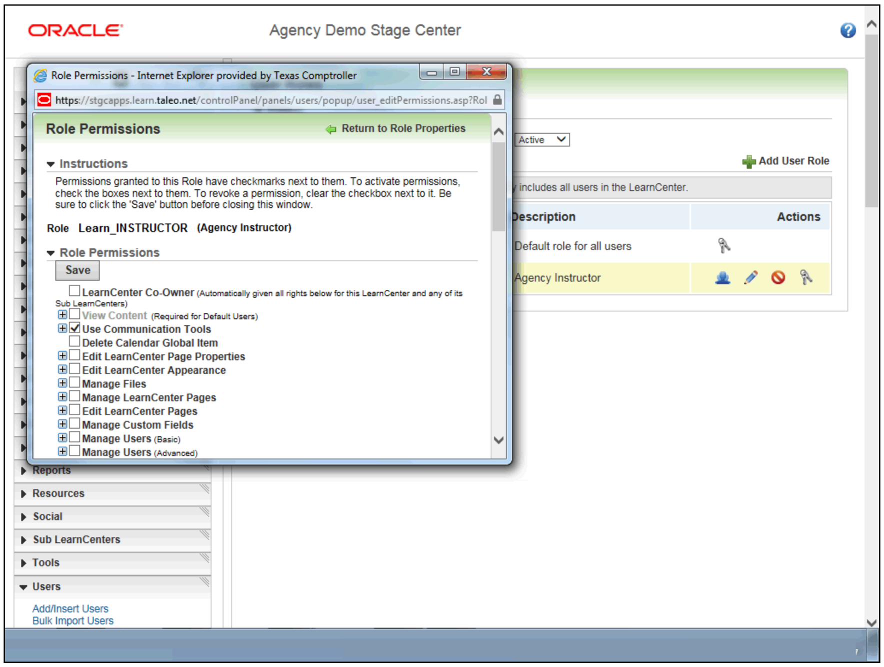
Step	Action
3.	Click the scrollbar.
4.	Click the **User Roles** link. 
5.	You will be editing the User Role - LRN_Instructor. Click the **Manage Users** button. 
6.	There are 2 users that are mapped to this Role. You will add another User. Click the **Add Users** link. 



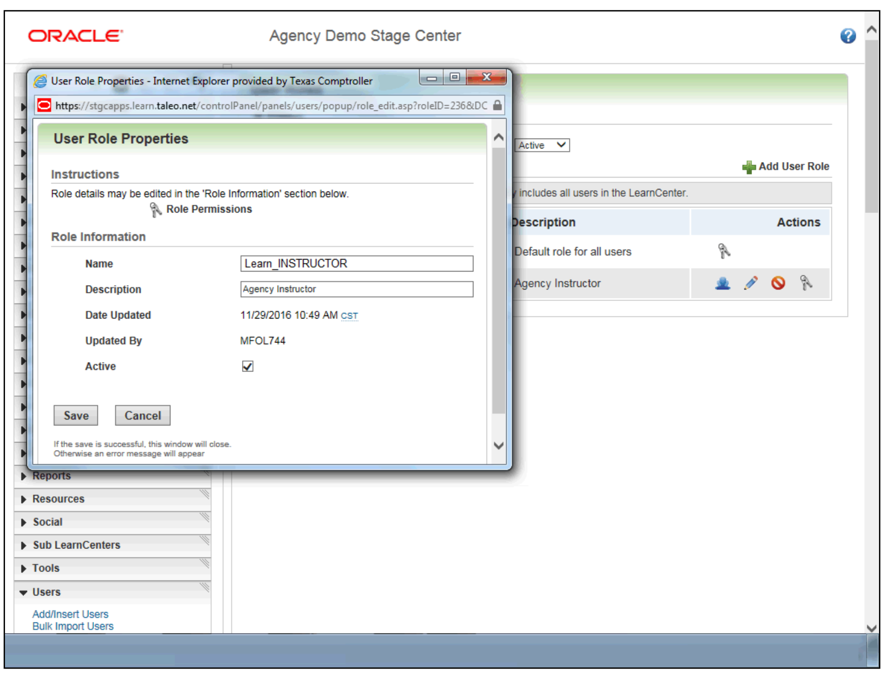
Step	Action
7.	Enter the desired information into the **First Name** field. Enter "**Poppy**". First Name
8.	Click the **Search** button. Search
9.	Click the **Selection** option.
10.	Click the **Return Selected** link. Return Selected



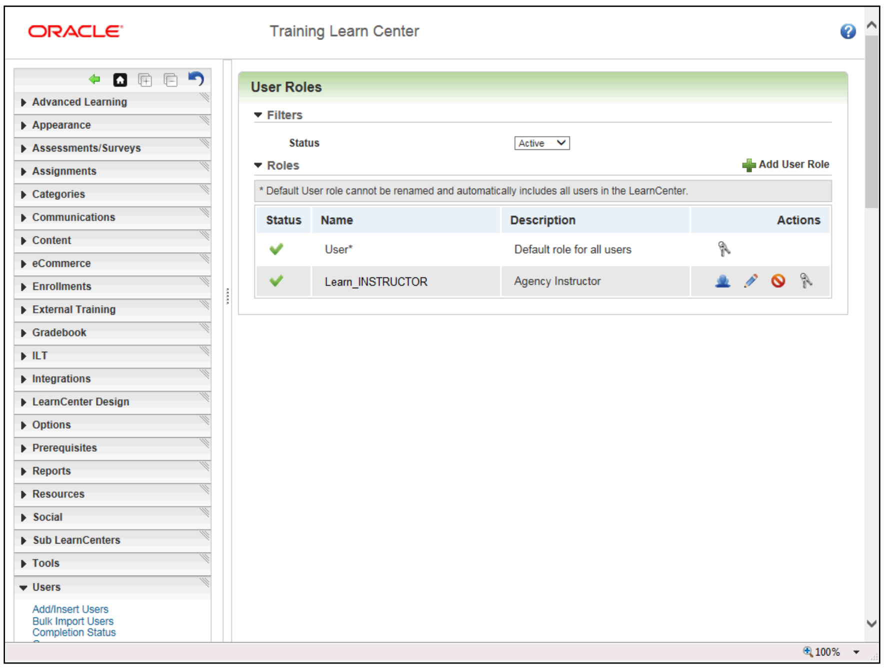
Step	Action
11.	Poppy Seed is added to the list of Users that are mapped to the Role. Click the **Return To User Roles** link. 
12.	Now you can view/edit the Role Permissions that are assigned. Click the **Edit Permissions** button. 
13.	It is recommended to review the existing User permissions before modifications are made as this may impact Users access. We will leave the Role Permissions, as is, for this example.



Step	Action
14.	Click the **Return to Role Properties** link. Return to Role Properties



Step	Action
15.	We didn't make any changes so we can Cancel instead of Save. Click the **Cancel** button. 



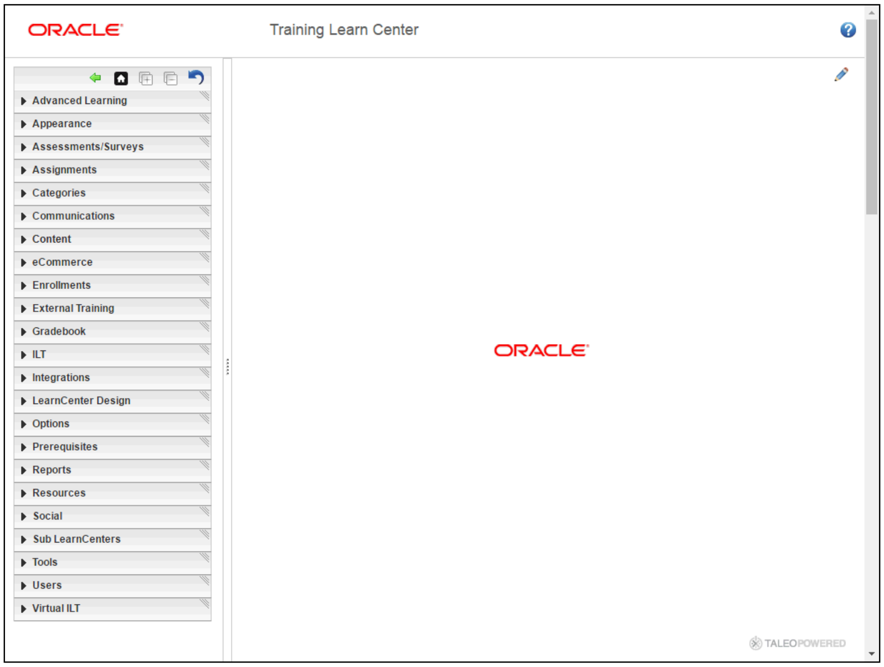
Step	Action
16.	Click the **Collapse All** button. 
17.	Click the **Control Panel Home** button. 
18.	Congratulations! You have completed this lesson. **End of Procedure.**

Managing/Defining Message and Notices

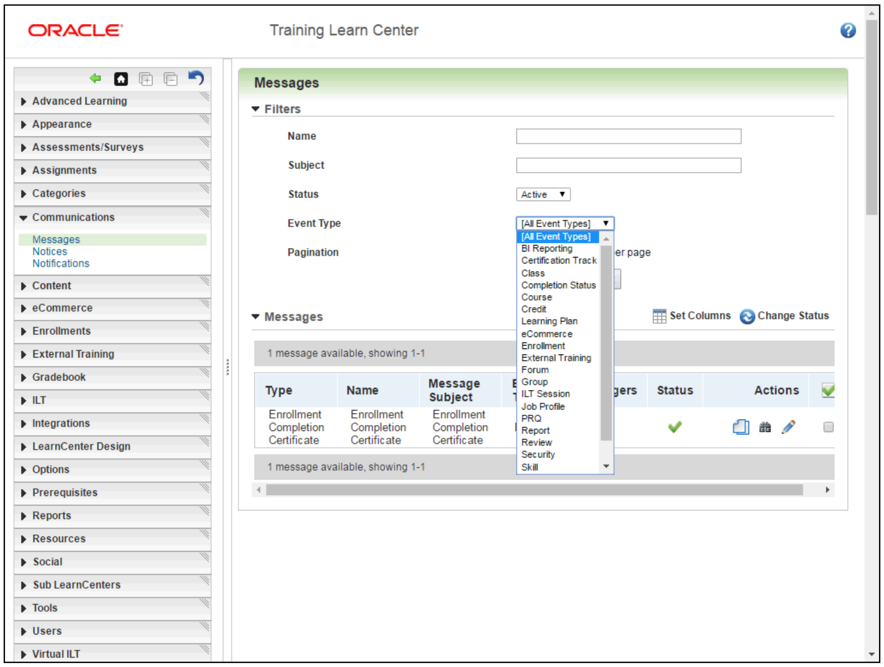
Section 2 - Lesson 1, Exercise 6 - **Managing/Defining Message and Notices**

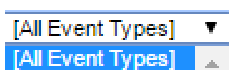
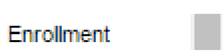
Procedure

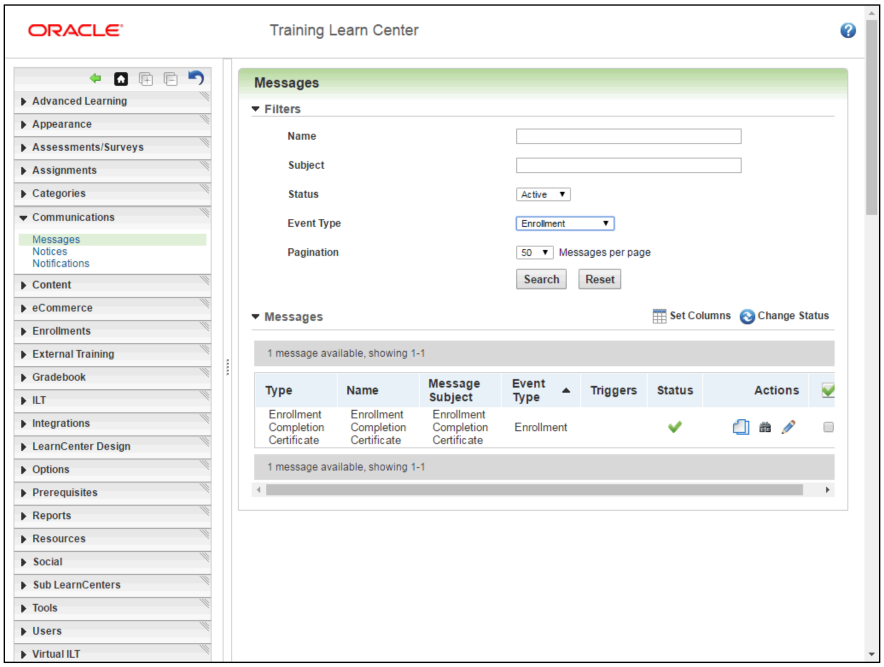
In this lesson, you will define a message for Communications.



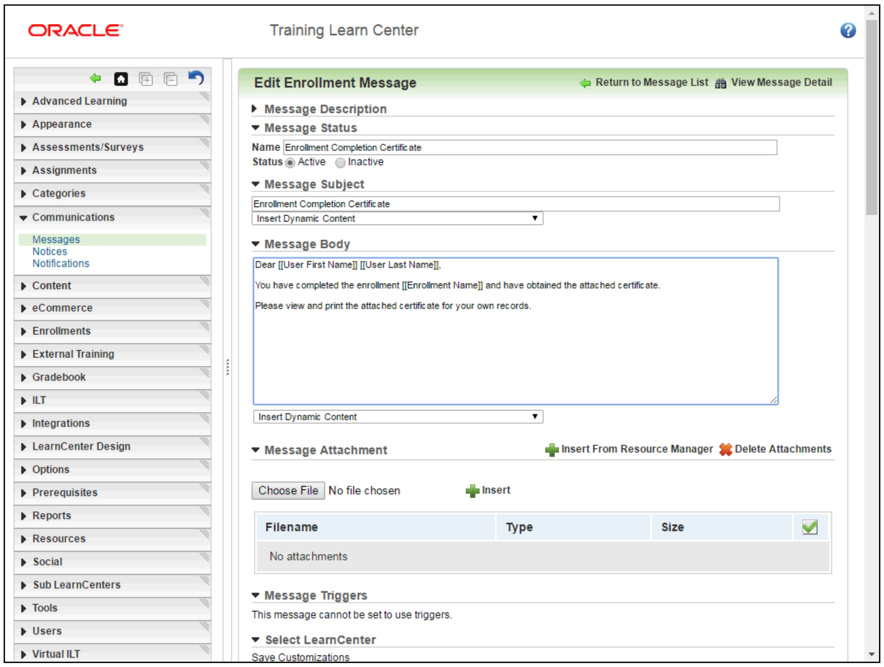
Step	Action
1.	Click the **Communications** link. ▶ Communications
2.	Click the **Messages** link. Messages
3.	You can use **Filters** to find specific messages according to the Status and/or the Event Type.
4.	There are (3) **Message** statuses: Active, Inactive, or Both. Click the **Status** dropdown button to activate the menu. Active ▼
5.	You will be using the Active status. Click the **Active** list item. Active



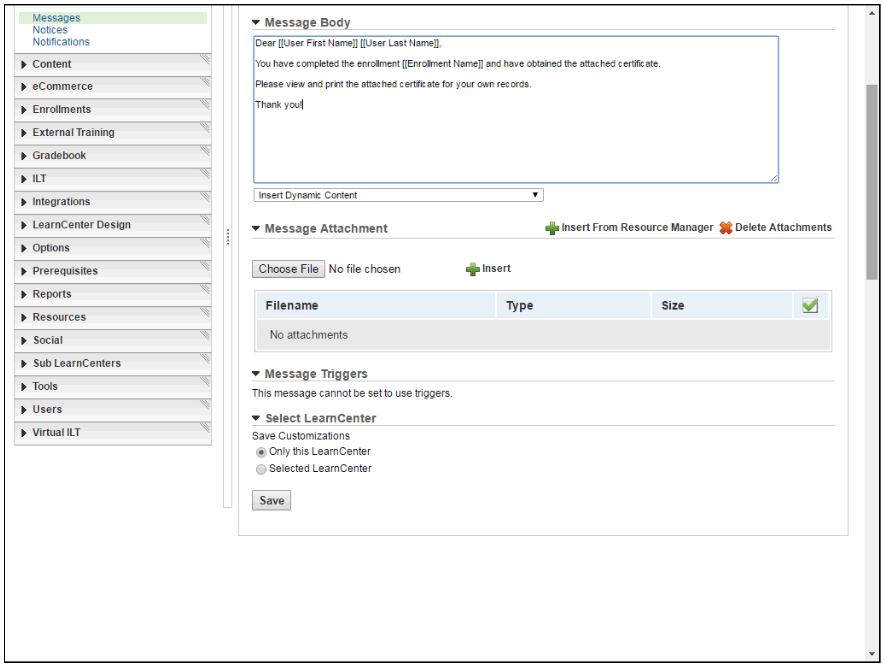
Step	Action
6.	Click the button to the right of the **Event Types** field. 
7.	All Event Types are listed. Click the **Enrollment** list item. 



Step	Action
8.	Click the **Search** button. Search
9.	You will edit the Enrollment Completion Certificate message. Click the **Edit** button.
10.	You are able to edit the **Name, Subject,** and **Body** of the message.
11.	Message templates offer a dynamic object tool to modify your messages. By selecting the delivered dynamic content, you can personalize the messages for your Users.
12.	The Dynamic Object cannot be changed.
13.	You will add a few words into the Message Body. Click in the field.



Step	Action
14.	Add a few spaces under the existing text. Press **[Enter]**.
15.	Press **[Enter]**.
16.	Enter the desired information into the field. Enter "**Thank you!**".
17.	Click the scrollbar.
18.	You may choose to use the **Message Attachment** feature. You will need to browse your computer for the file in order to attach it.



Step	Action
19.	Click the **Save** button. 
20.	Click the **Return to Message List** link. 
21.	Click the **Collapse** link. 
22.	Click the **Home** link. 
23.	Congratulations! You have completed this lesson. **End of Procedure.**

S2L2 - Content and Training Admins

Configuring/Displaying LC Pages

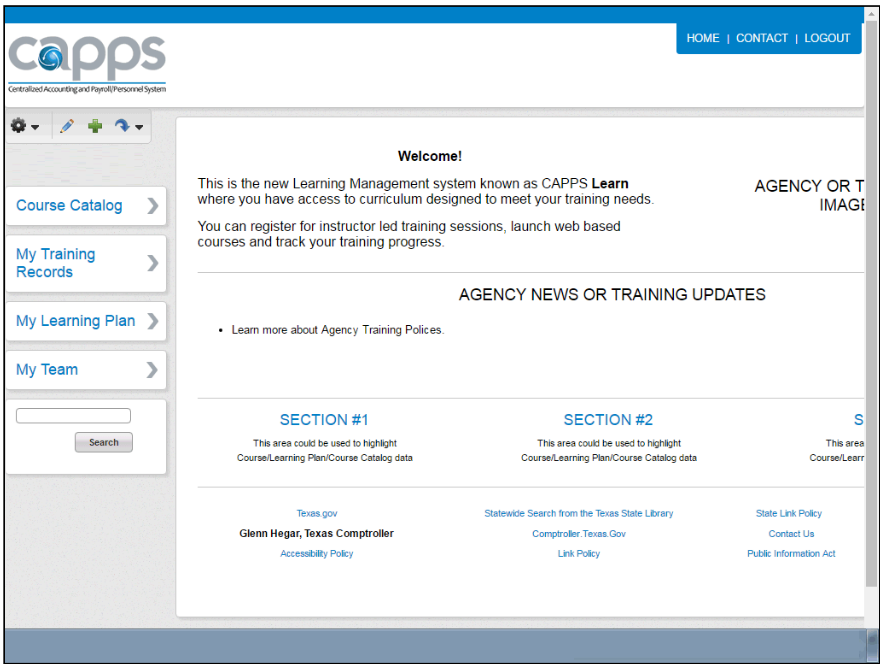
Section 2 - Lesson 2, Exercise 1 - **Configuring/Displaying LC Pages**

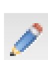
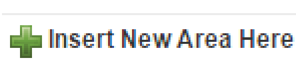
Procedure

In this lesson, you will learn how to edit a page by adding a Dynamic Object (DO) link.

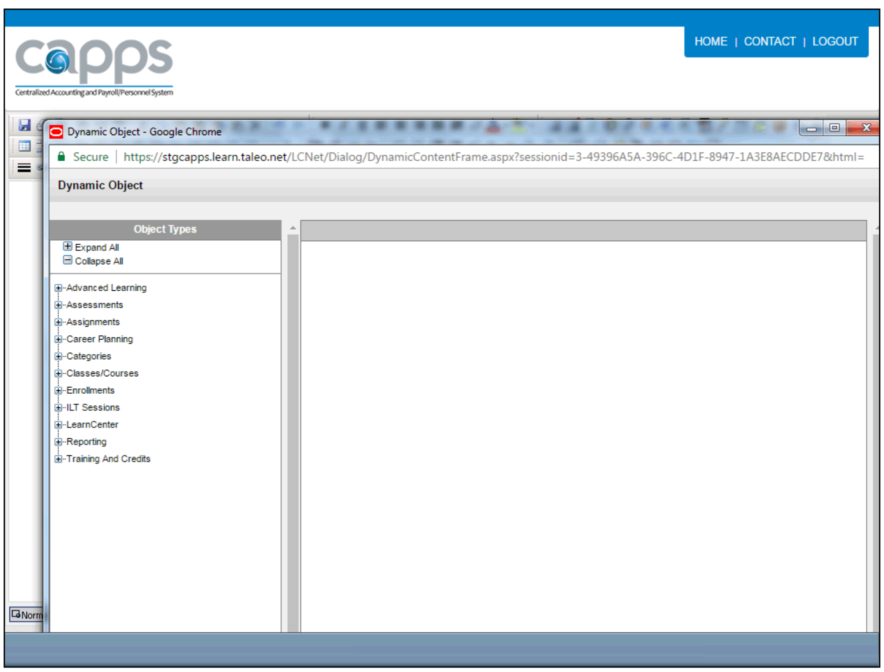
- You will walk through the steps of adding a WBT class link to the Main Web Page - Home Screen.

Step	Action
1.	**Note:** Internet Explorer (IE) will not work with the LearnCenter page editor (WYSIWYG).



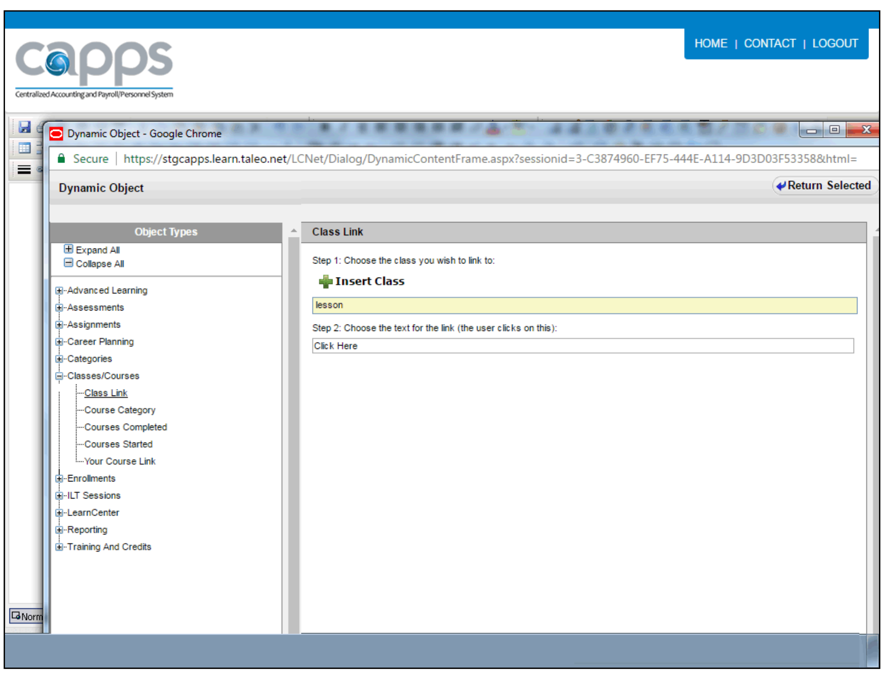
Step	Action
2.	Click the **Edit Mode** button. 
3.	From this page you can identify the Region (area) of the page where you want to add course/class DO link.
4.	Click the **Insert New Area Here** link. 

Step	Action
5.	You can change the Area Type but we will use the Free-Form (Text and Graphics) option. Click the **Add Area** button. Add Area
6.	The LearnCenter Page Editor will be displayed in the center of the page better known as the **WYSIWYG** editor. It is used to design a LearnCenter page. It uses buttons similar to those you are already familiar with in other software programs.
7.	To add a Dynamic Object for the course/class link, Click the **Lightning Bolt** button. 

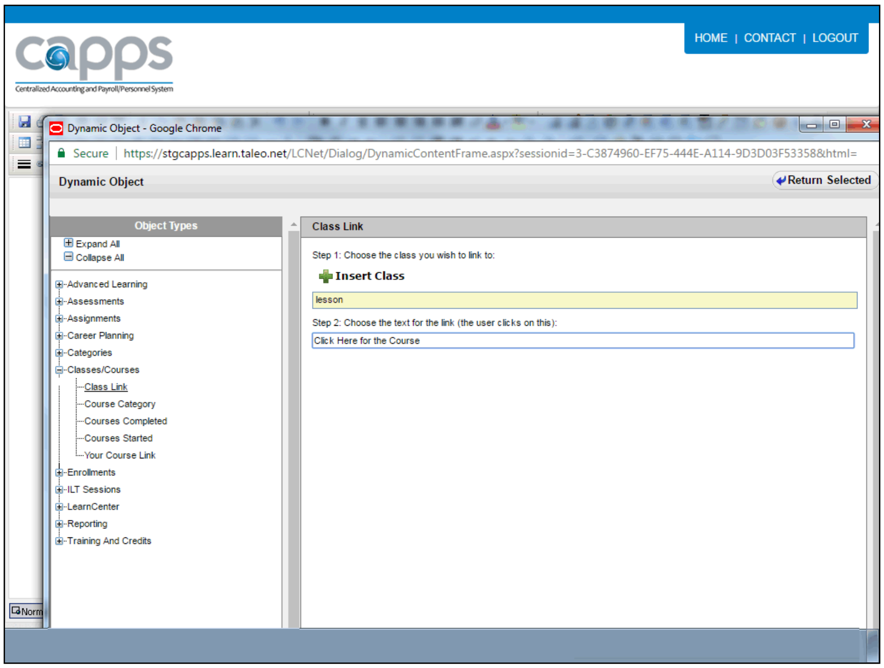


Step	Action
8.	Click the **Classes/Courses** link. Classes/Courses

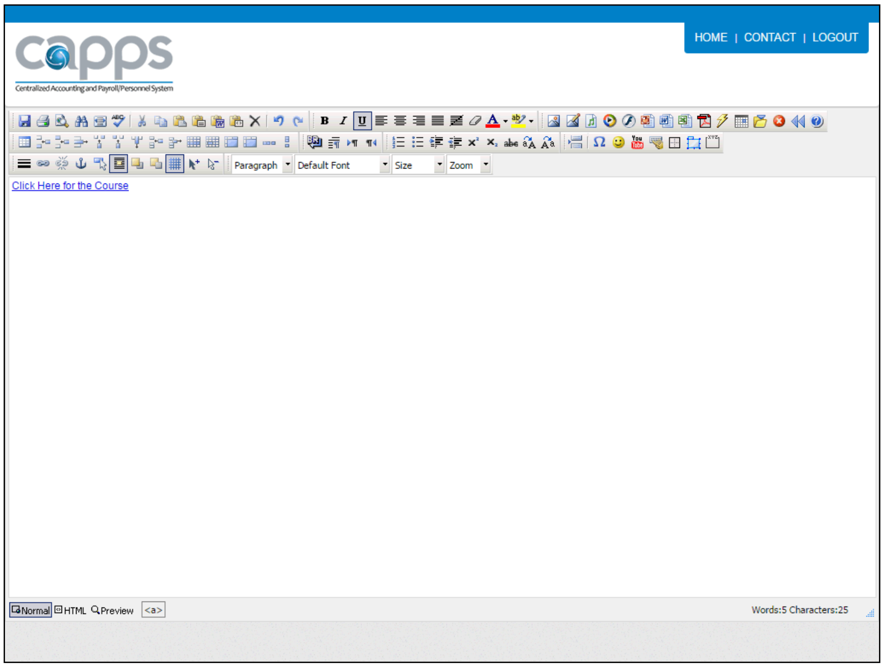
Step	Action
9.	Click the **Class Link** link. Class Link
10.	In order for your class to be available it has to be in the showroom otherwise it will not be displayed. Click the **Insert Class** link. Insert Class
11.	The **Class Link Selector** page allows you to use Filters to search for the Class or review the Data List for the classes available.
12.	You will be using the Class named "lesson". Click the **Select** option.
13.	The **Returned Selected** button serves as a Save on this page. Click the **Return Selected** button. Return Selected



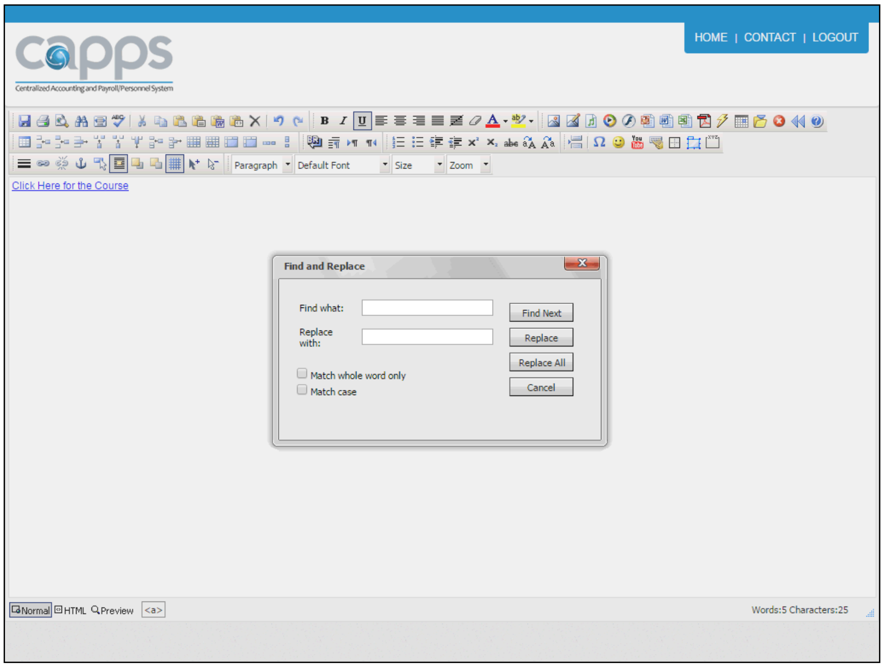
Step	Action
14.	Step 2 is referring to the text that the User will see and will click on to access the Class. The text already includes the words **Click Here** but we want the text to read - **Click Here for the Course**. Enter the desired information into the field. Enter " **for the Course**".



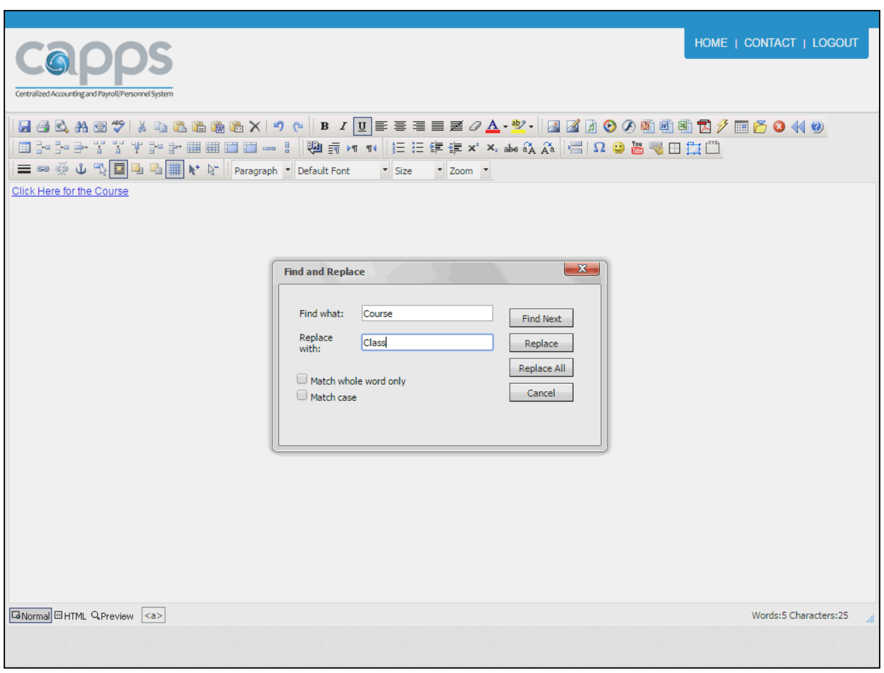
Step	Action
15.	Click the **Return Selected** button. Return Selected
16.	The link for the course appears in the **WYSIWYG Editor** as a link. (This is what it will look like on the Home Page.)



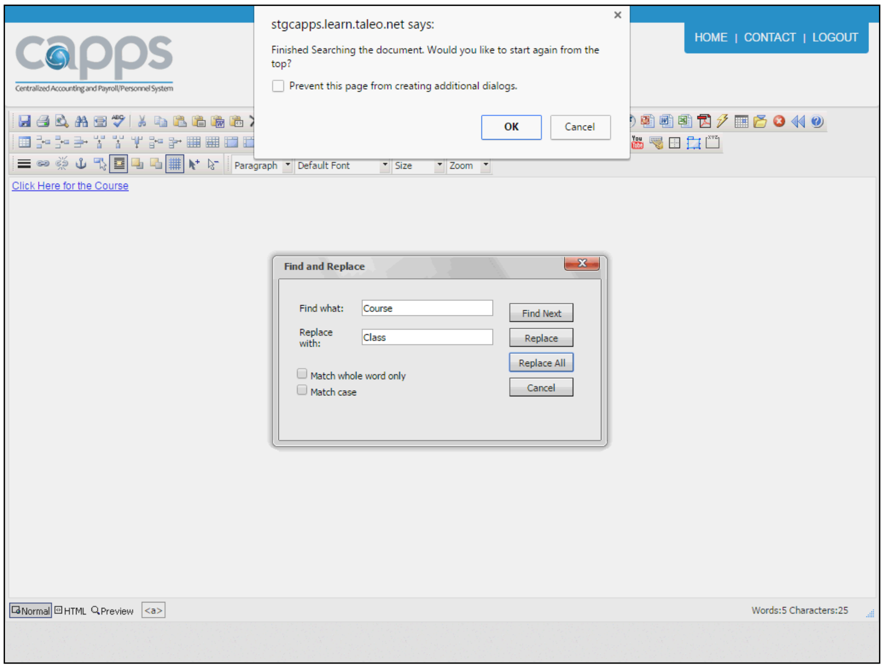
Step	Action
17.	Your work must saved. Click the **Save** button. 
18.	There is a Preview in the blue boxed area and you can determine the Display Options, if applicable.
19.	You notice that in the Preview, you should have used Class instead of Course. Use the Edit button to fix this error.
20.	Click the scrollbar. 
21.	Click the **Edit** button. 
22.	You will use the **View** Icon to find and replace text. Click the **Find** link. 

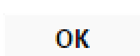


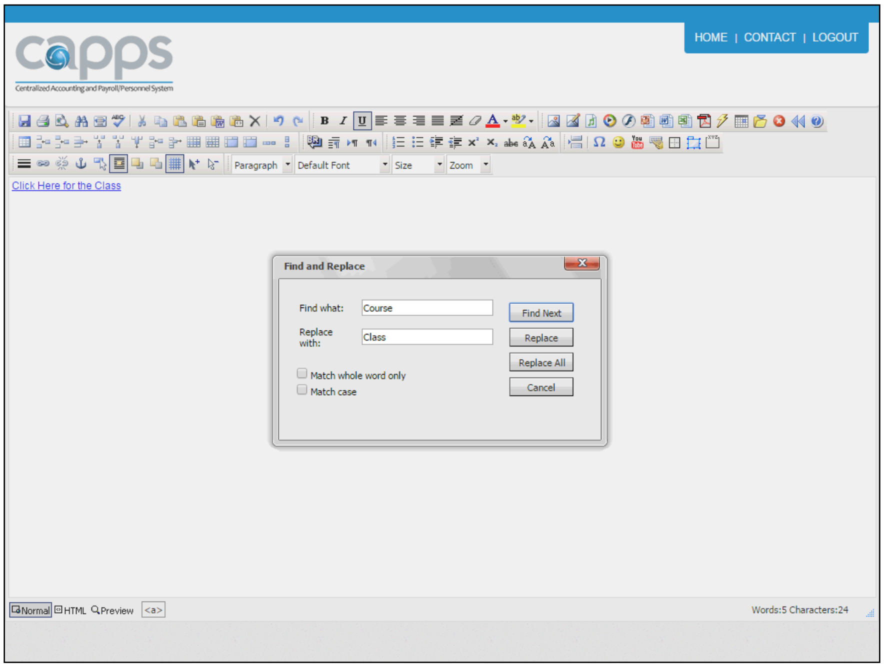
Step	Action
23.	Enter the desired information into the **Find what** field. Enter "**Course**".
24.	Enter the desired information into the **Replace with** field. Enter "**Class**".



Step	Action
25.	Click the **Find Next** button. 



Step	Action
26.	This screen may come up multiple times unless you select the Prevent option. Click the **Prevent this page from creating additional dialogs** option. 
27.	Click the **OK** button. 



Step	Action
28.	Click the **Replace** button. Replace
29.	Note the change from Course to Class. Click the **Close** button. 
30.	Click the **Save** button. 
31.	The change is in the **Preview** area now so you will go to the Home Page to test it. Click the **Home** link. HOME
32.	Click the **Click Here for the Class** link. Click Here for the Class
33.	The class launched as expected. Click the **Exit this class** link. Exit this class

Step	Action
34.	Congratulations! You have completed this lesson. **End of Procedure.**

Creating Courses with LC Course Editor

Section 2 - Lesson 2, Exercise 2 - **Creating Courses with LC Course Editor**

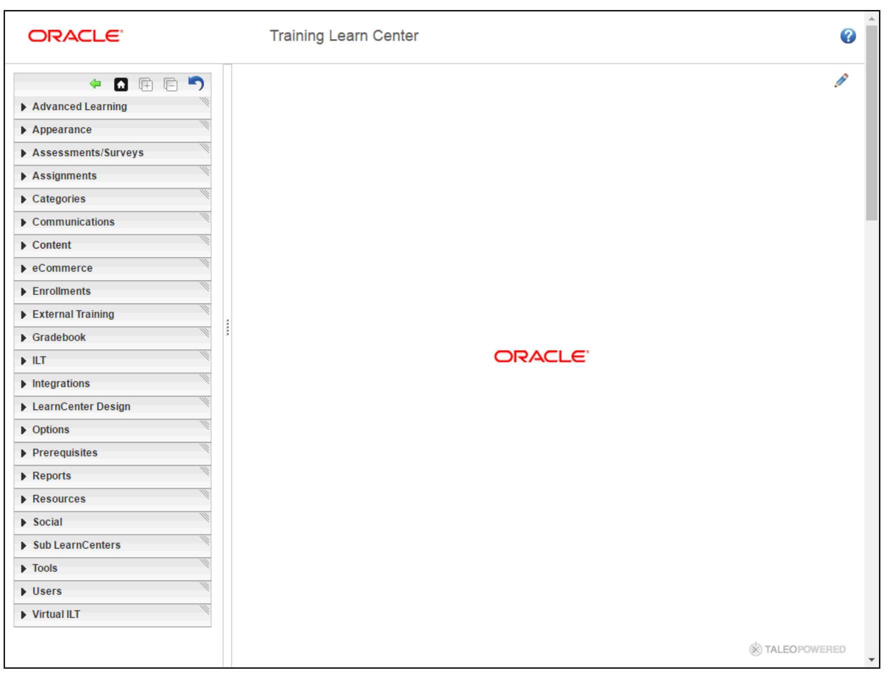
The LearnCenter WYSIWYG (What You See is What you Get) Course Editor, is a web-based authoring tool available inside your LearnCenter. It allows you to create multimedia web-based content inside your LearnCenter. This editor is very similar to the Site Editor and Page Editor used to design the main site header and the LearnCenter Pages.

Some HTML customizations, such as height and width settings, may negatively impact on-screen viewing. Always test and validate any custom HTML code to ensure that it displays as you intended.

Internet Explorer (IE) does not work well with this editor.

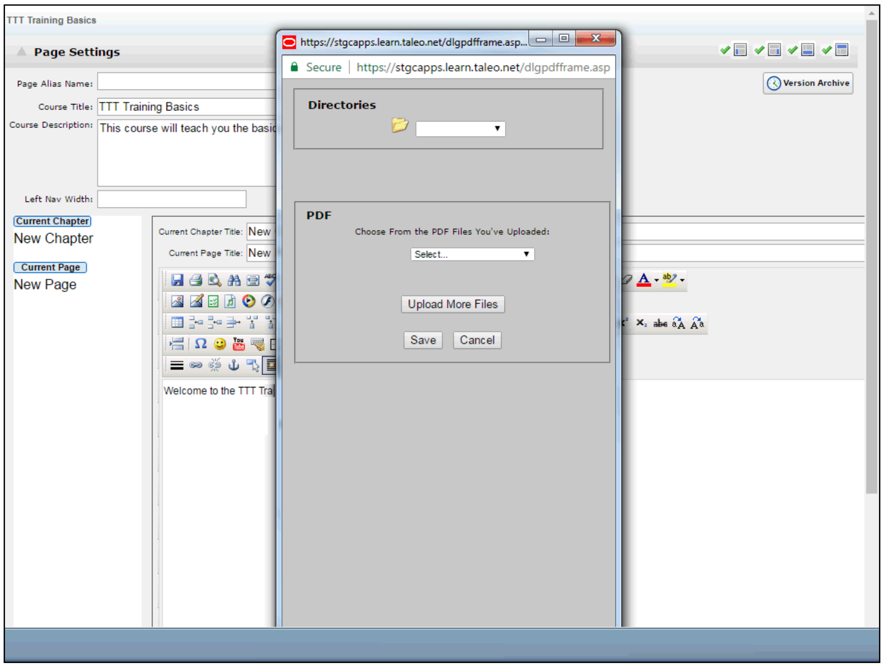
Procedure

In this lesson, you will learn how to create a course with the LearnCenter Course Editor.

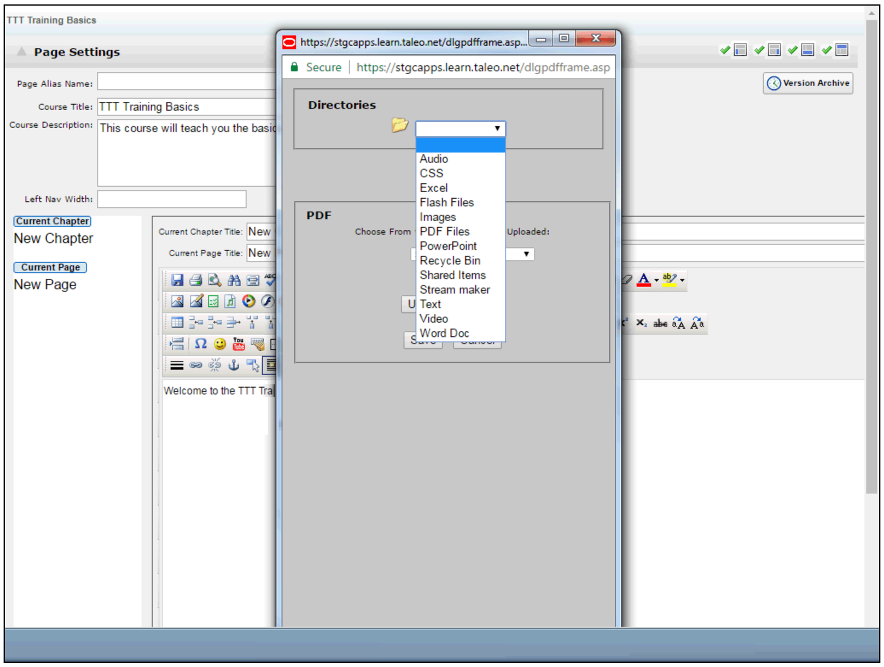


Step	Action
1.	Click the **Content** link. Content

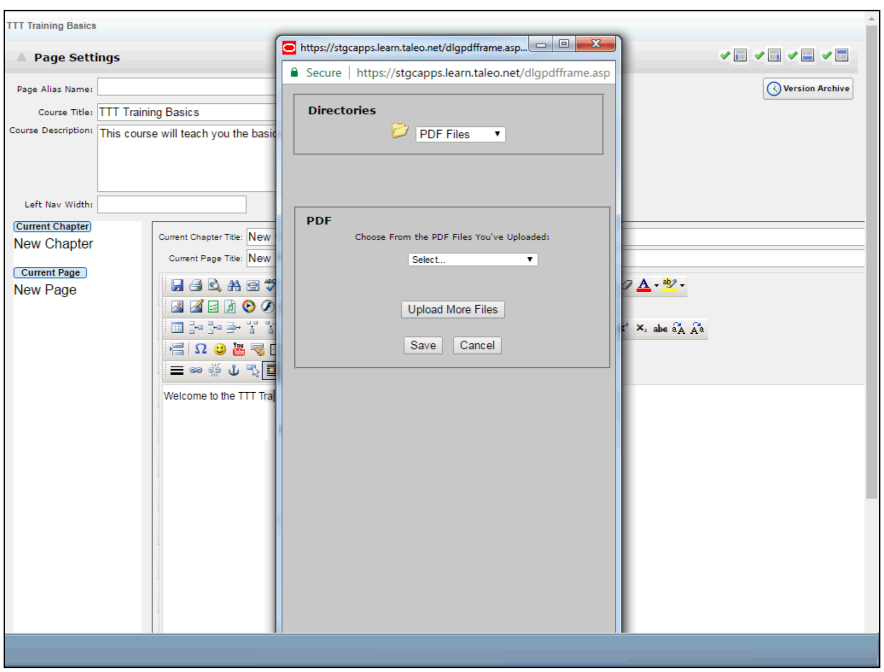
Step	Action
2.	Click the **Add New Course** link. Add New Course
3.	Enter the desired information into the **Name** field. Enter "**TTT Training Basics**".
4.	Enter the desired information into the field. Enter "**This course will teach you the basics in order to train your end users.**".
5.	Click the scrollbar.
6.	Click the **Continue** button. Continue
7.	Click the **Continue** button. Continue
8.	Outside of training you should take the time to read the Introduction Overview. Click the **Start Modifying Your Course** link. Start Modifying Your Course
9.	The WYSIWYG Course Editor lets you develop chapters and pages for a course and design the layout of each page using variable fonts, versatile text placement, and the inclusion of multimedia elements.
10.	Enter the desired information into the field. Enter "**Welcome to the TTT Training Basics Course.**".
11.	Now you are going to add a file to be included in this course. It exists within the files in Resource Manager. Click the **PDF** link.



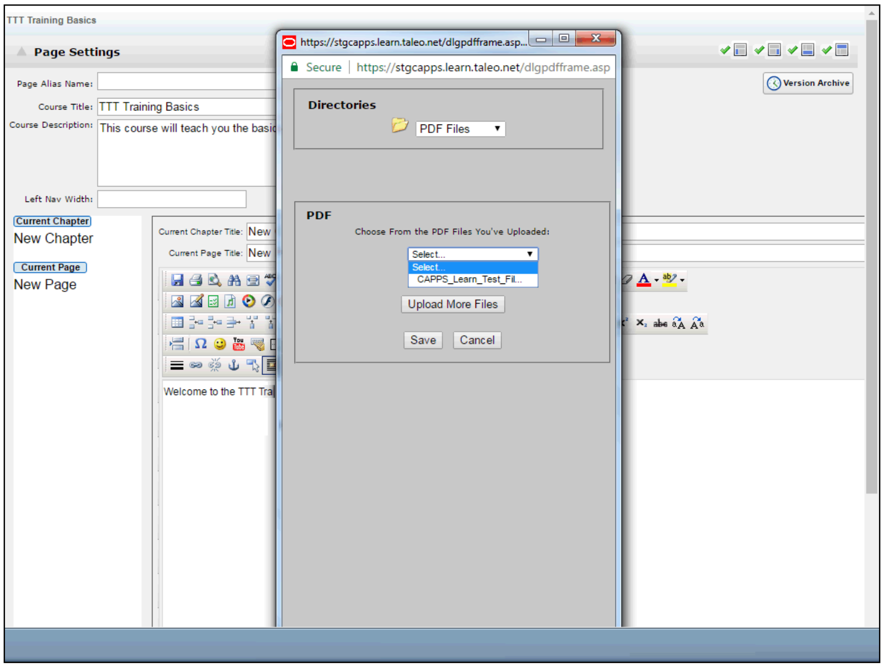
Step	Action
12.	You will search for the file in the PDF Files Directory. Click the **Directories** dropdown button to activate the menu. 



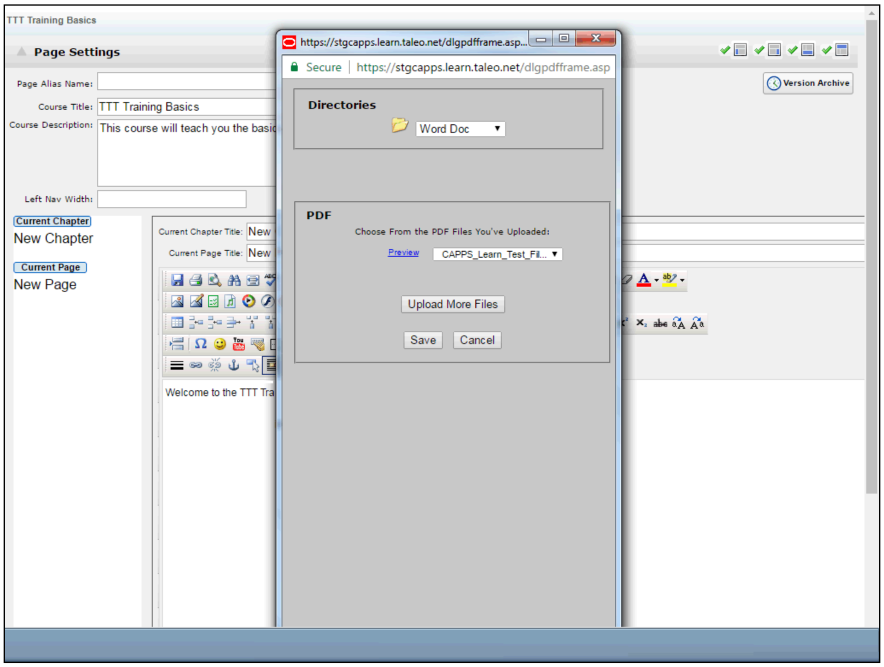
Step	Action
13.	Click the **PDF Files** list item. PDF Files



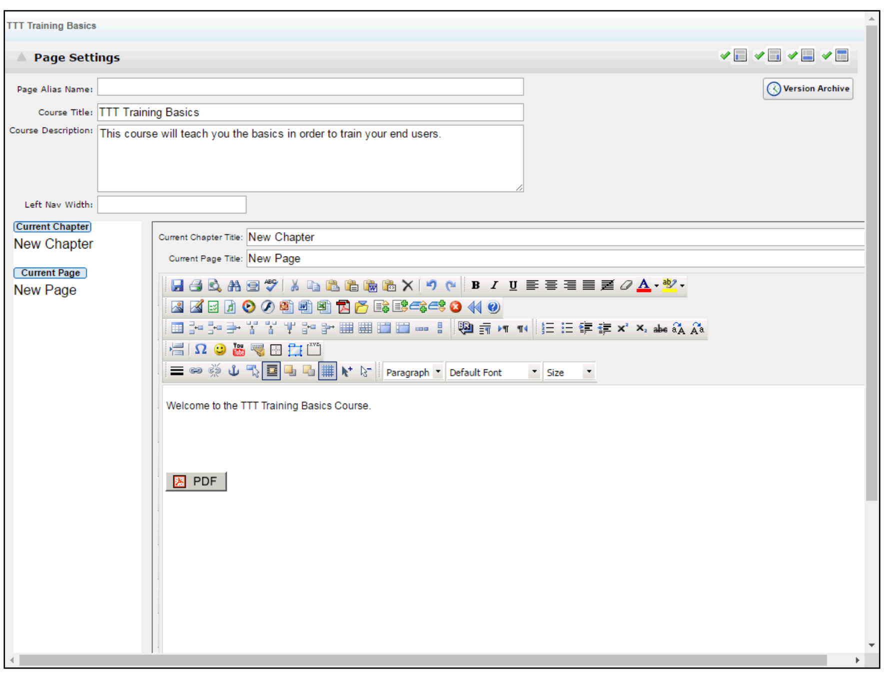
Step	Action
14.	Click the **Select** dropdown button to activate the menu. ▼

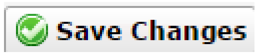


Step	Action
15.	Click the **CAPPS_Learn_Test_File** list item. CAPPS_Learn_Test_Fil...



Step	Action
16.	Click the **Save** button. Save



Step	Action
17.	Click the scrollbar.
18.	Click the **Save Changes** button. 
19.	This button Ends the Course.
20.	This button takes you to an Evaluation and the option to End a Course.
21.	Click the **End Course** button. 
22.	Congratulations! You have completed this lesson. **End of Procedure.**

Inserting a WBT

Section 2 - Lesson 2, Exercise 3 - **Inserting a WBT**

There are several steps involved in implementing a WBT in a LearnCenter:

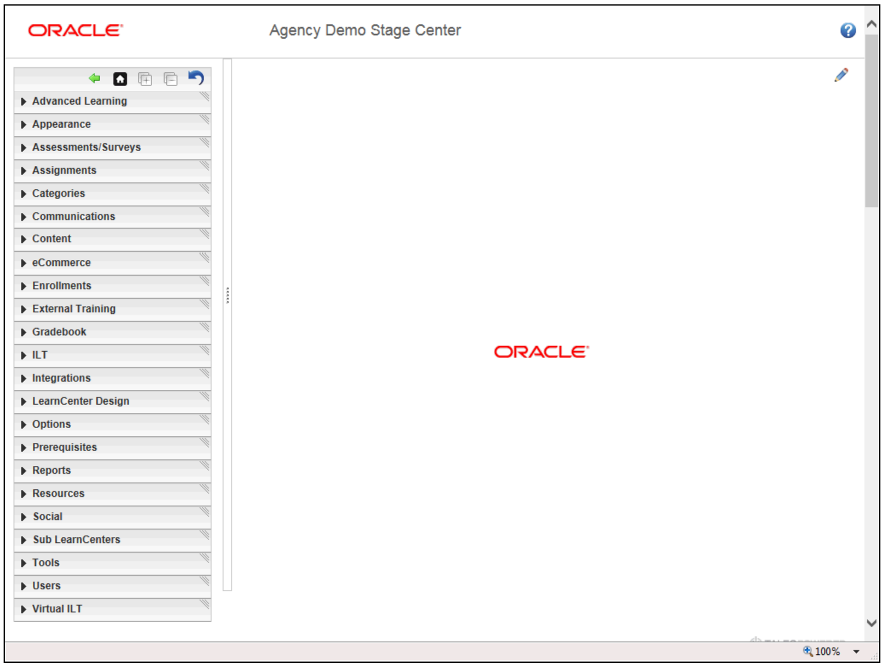
Admins will perform Steps 1, 4 and 5 ONLY

1. **Create WBT - You will create the WBT content in an authoring tool.**
2. FTP WBT Content files to your FTP Site - Using FTP software, you upload the content files to the FTP site for your LearnCenter.
3. *Import* WBT Content - You import the content into your LearnCenter, creating a link or a pointer for the content inside LearnCenter. *At this point, the content is in the "warehouse" and Users cannot yet see the content.*
4. ***Insert* WBT Content - Once tested, you insert the WBT content from the Warehouse into the showroom.**
5. **Distribute WBT to Users on the webpage via container**, i.e. Learning Plan, Enrollments, Assignments in your LearnCenter pages.

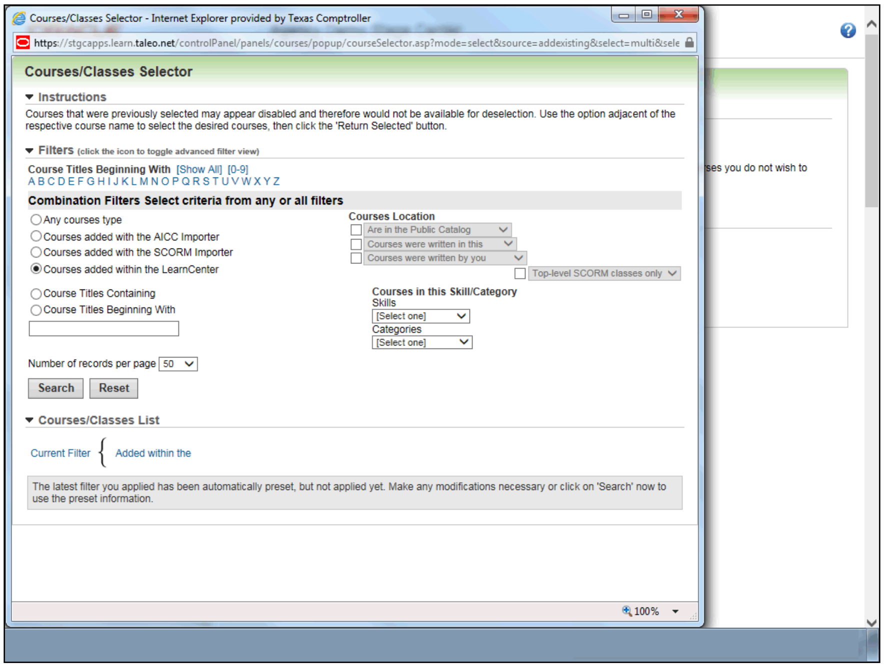
Procedure

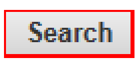
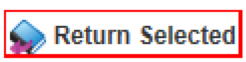
In this lesson, you will learn how to insert an existing WBT course from the warehouse to the showroom.

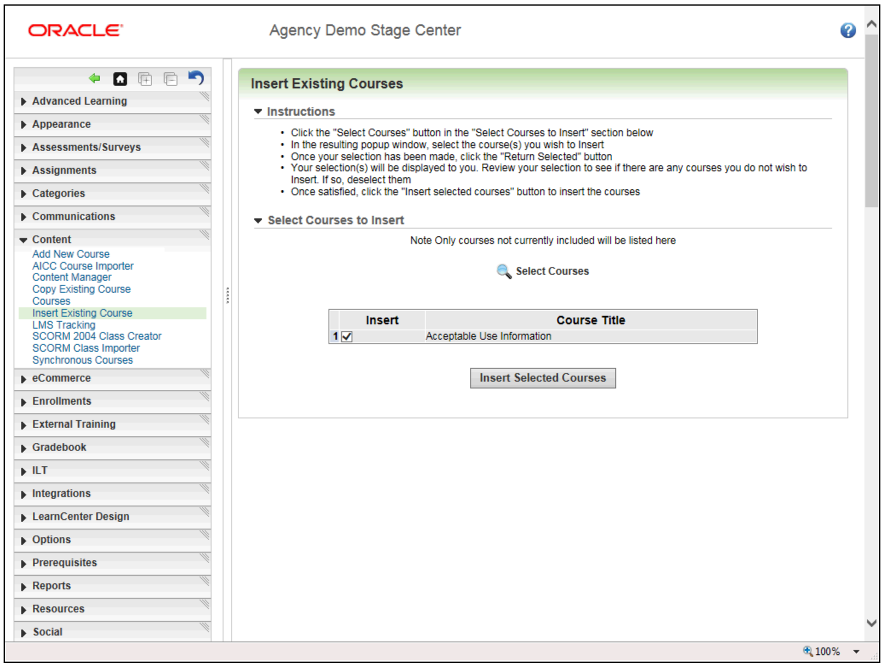
WBT course: Acceptable Use Information



Step	Action
1.	Click the **Content** link. Content
2.	Click the **Insert Existing Course** link. Insert Existing Course
3.	Click the **Select Courses** link. Select Courses



Step	Action
4.	Use the search Filter (you can leave the default). Click the **Search** button. 
5.	Click the scrollbar.
6.	Click the **Acceptable Use Information** option. 
7.	Click the scrollbar.
8.	Click the **Return Selected** link. 



Step	Action
9.	Click the **Insert Selected Courses** button. Insert Selected Courses
10.	Congratulations! You have completed this lesson. **End of Procedure.**

Uploading Files to Resource Manager

Section 2 - Lesson 2, Exercise 4 - **Uploading Files to Resource Manager**

Before you can use files like images, audio, or documents, on your site, you must first upload them to the Resource Manager. When you upload files, you can do so directly to standard or custom folders to keep things organized.

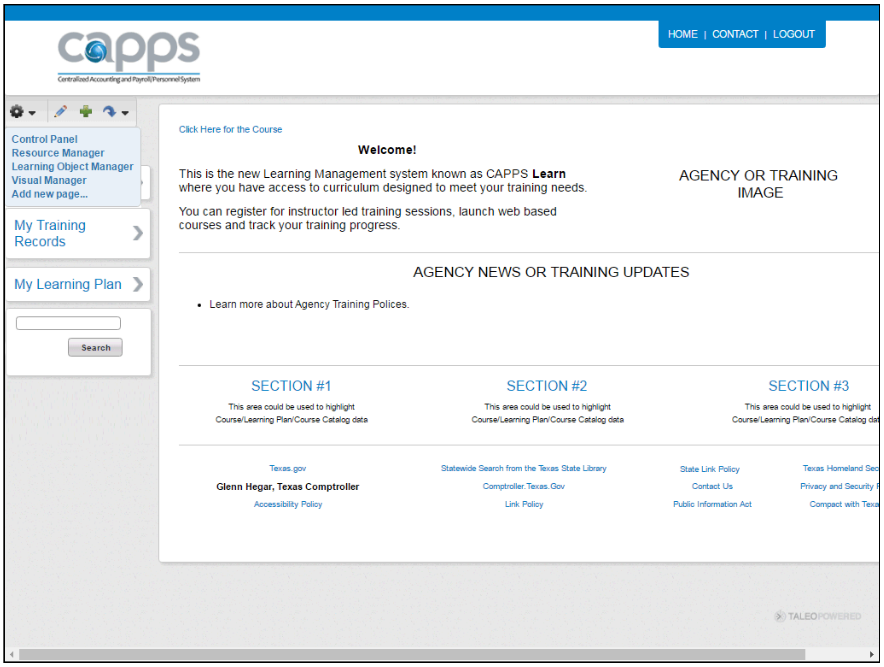
You are able to choose different users to upload the fields, i.e., personal, shared or global.

There is a size limit of 10mb.

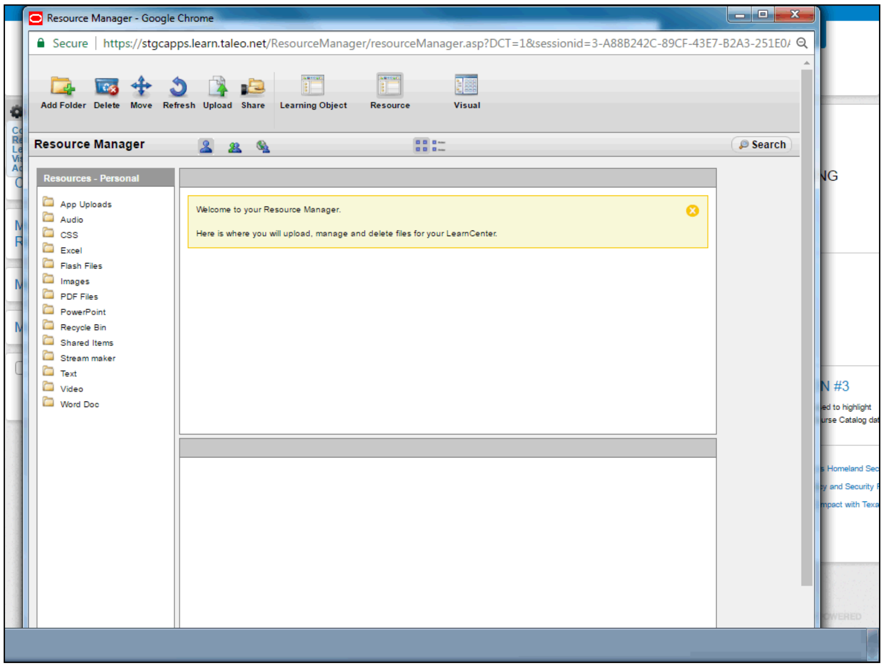
Procedure

In this lesson, you will learn how to upload a file to the Resource Manager.

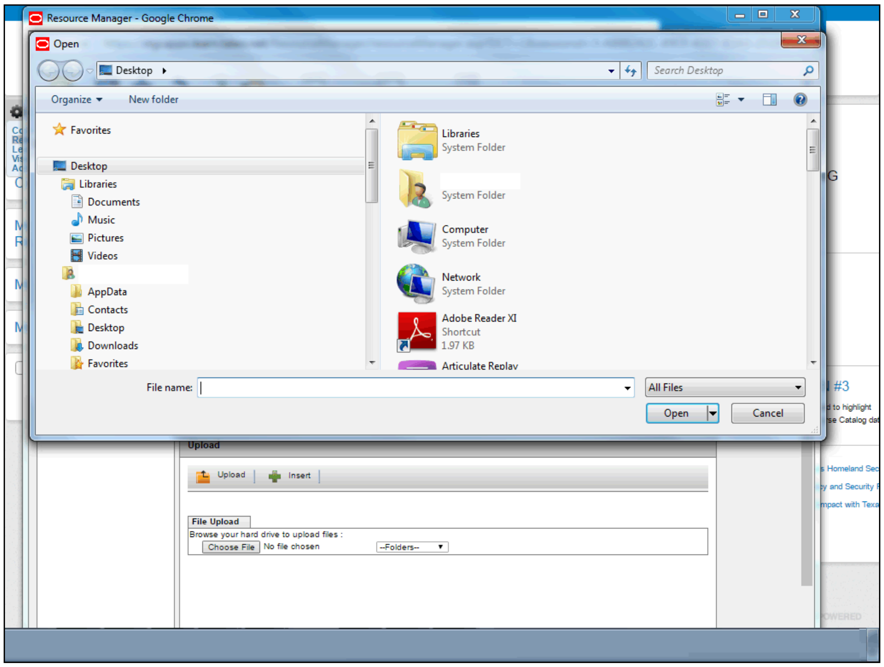
File Name: Using_UPK_Instructions

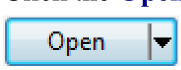


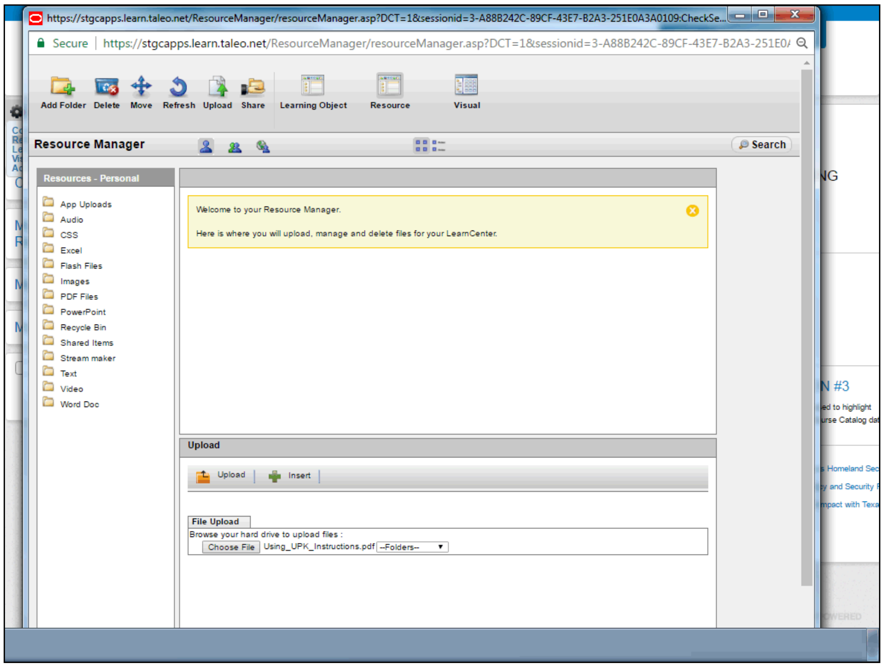
Step	Action
1.	Click the **Control** dropdown button to activate the menu. 
2.	Click the **Resource Manager** link. Resource Manager



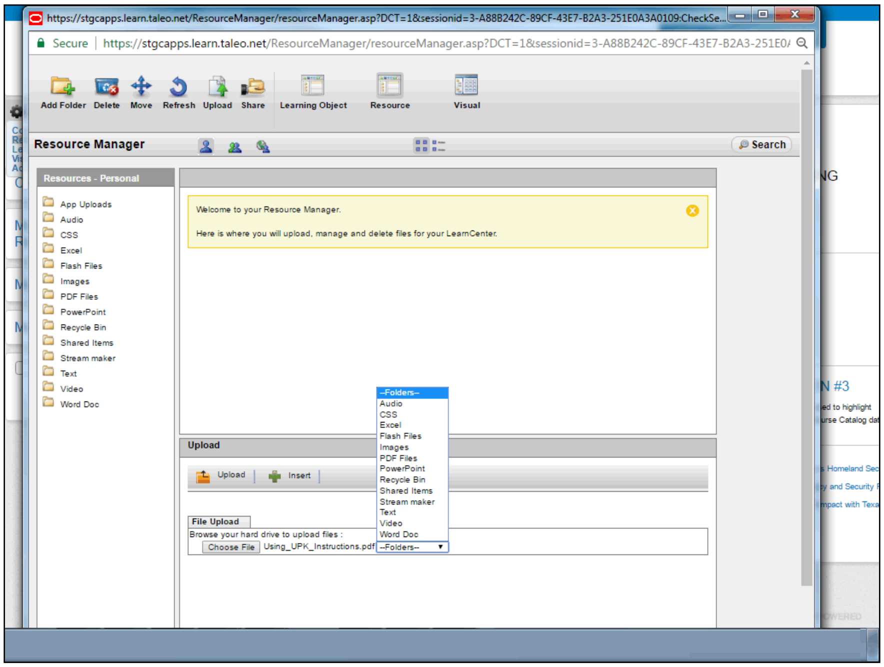
Step	Action
3.	Click the **Upload** button. 
4.	Click the **Choose File** link. 



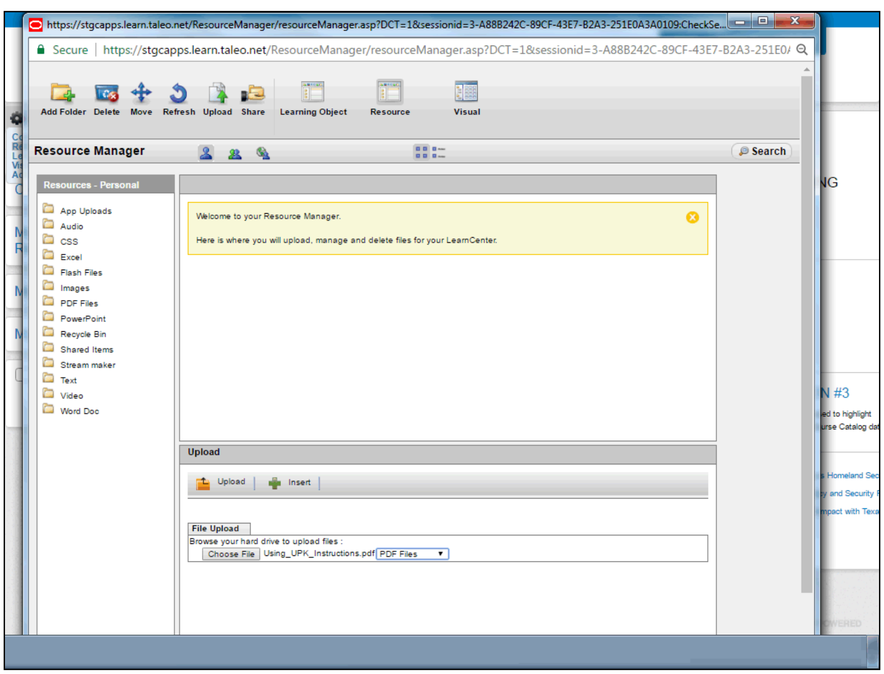
Step	Action
5.	Locate the file on your computer, Click the scrollbar.
6.	Click the **Using_UPK_Instructions.pdf** object. Using_UPK_Instructions.pdf Adobe Acrobat Document 278 KB
7.	Click the **Open** button. 



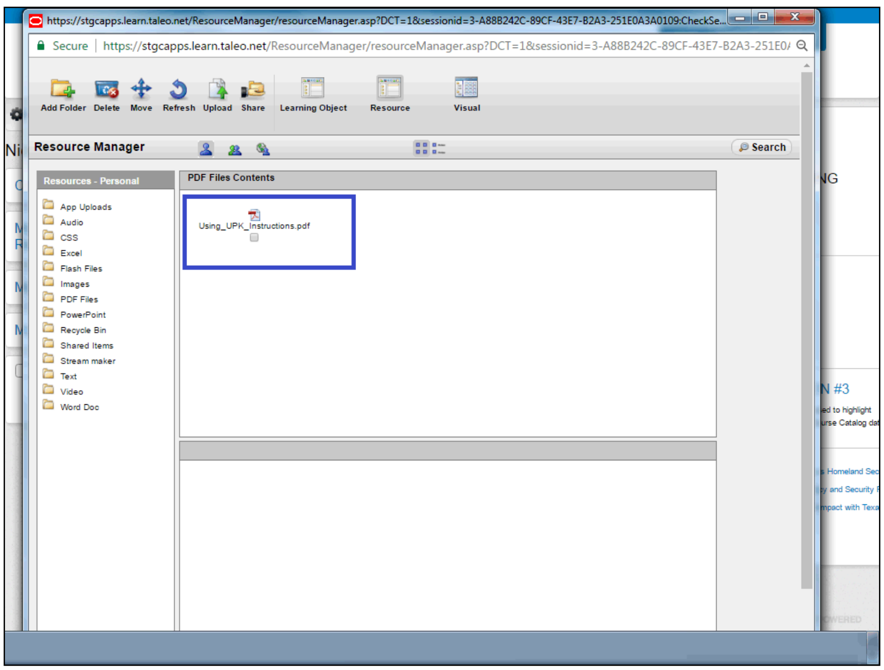
Step	Action
8.	You will select where the file will be stored in **Resource Manager**. Click the button to the right of the **Folders** field. 



Step	Action
9.	Click the **PDF Files** list item. PDF Files



Step	Action
10.	Click the **Upload** button. 
11.	Let's check to see if the file is in the PDF Files folder. Click the **PDF Files** link. 



Step	Action
12.	It appears within the PDF Files Contents. Click the **Close** button. 
13.	Congratulations! You have completed this course. **End of Procedure.**

Creating Categories

Section 2 - Lesson 2, Exercise 5 - **Creating Categories**

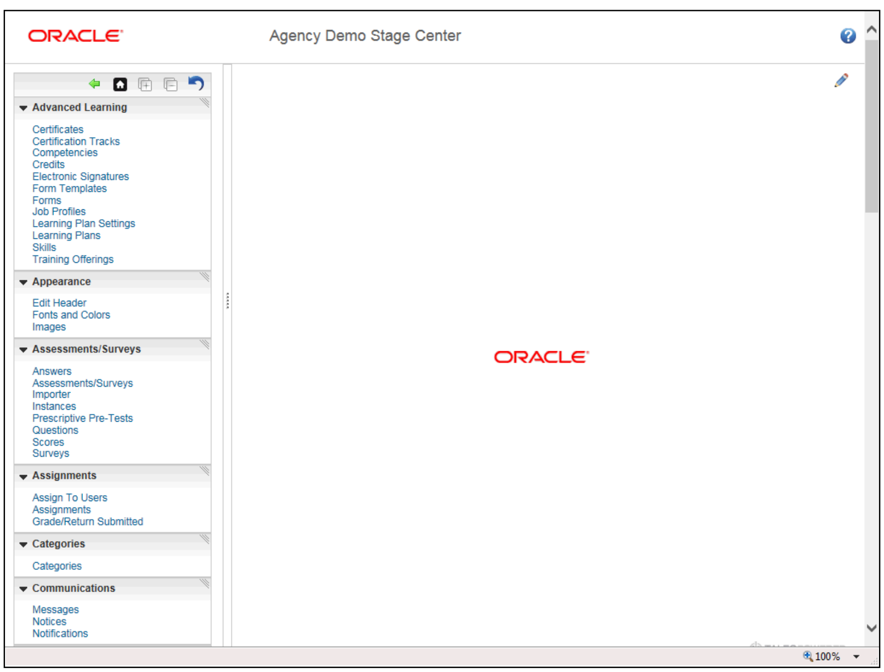
In LearnCenter, categories can be thought of as folders in which you keep related items. You can use categories to help organize and manage various LearnCenter items, such as enrollments, ILT sessions, classes, assignments, assessment-related items, skills and groups.

As your use of LearnCenter increases, so will the number of items contained within your LearnCenter. By assigning items to categories, you make them easier for Users and Administrators to locate and manage them. Throughout LearnCenter there are search filters that enable you to locate or sort items by category.

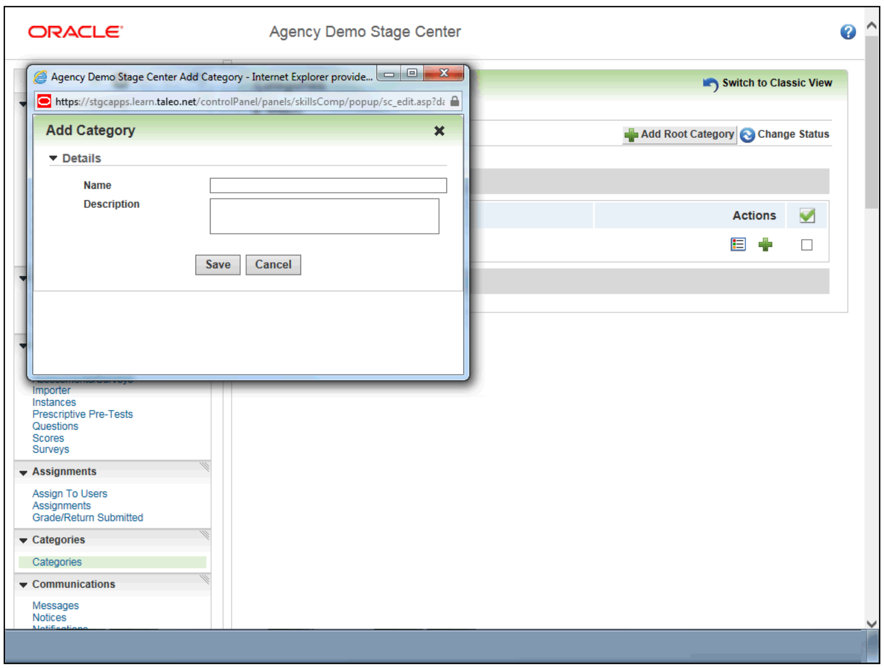
Procedure

In this lesson, you will learn how to create several categories:

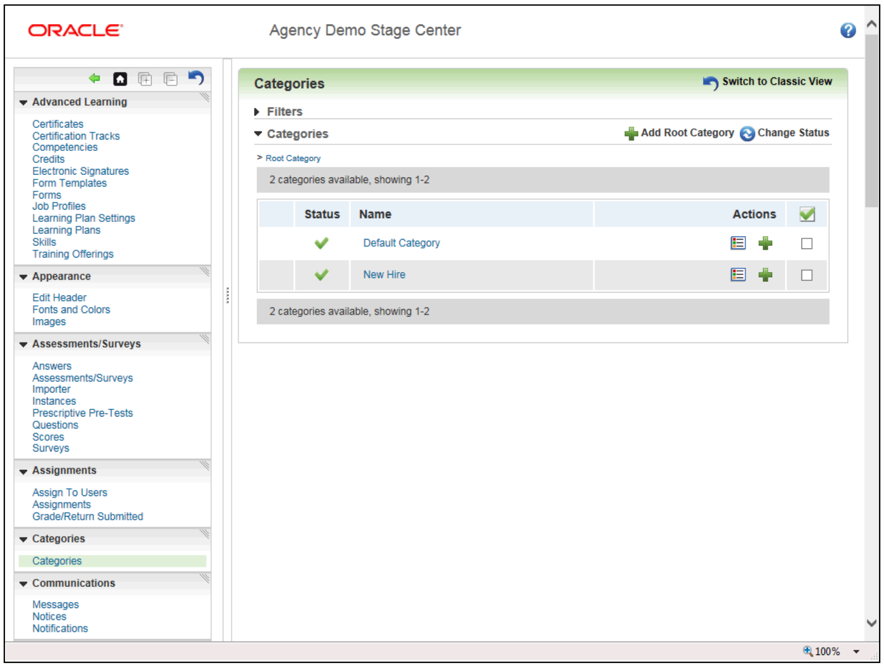
1) New Hire
2) Leadership
3) Finance
4) Customer Service and
5) Human Resources

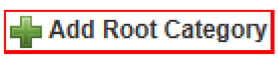


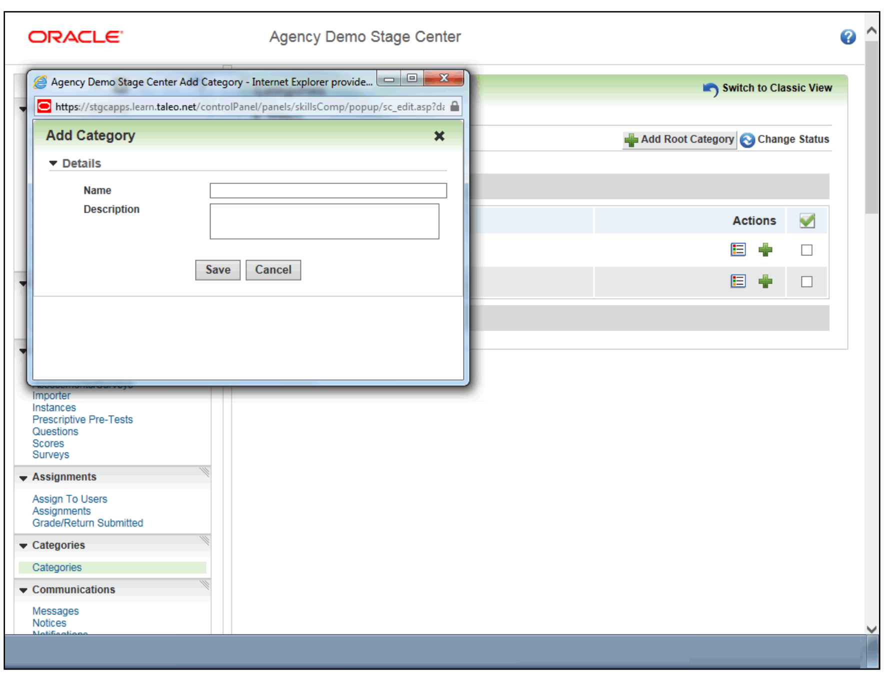
Step	Action
1.	Click the **Categories** link. Categories
2.	Click the **Add Root Category** link. Add Root Category



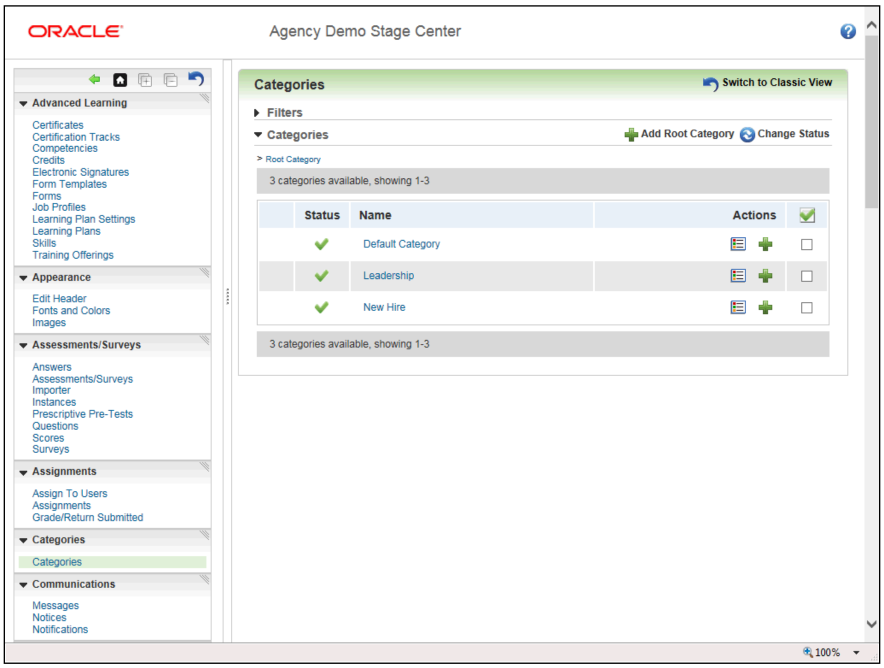
Step	Action
3.	Enter the desired information into the **Name** field. Enter "**New Hire**". Name
4.	Click the **Save** button. Save



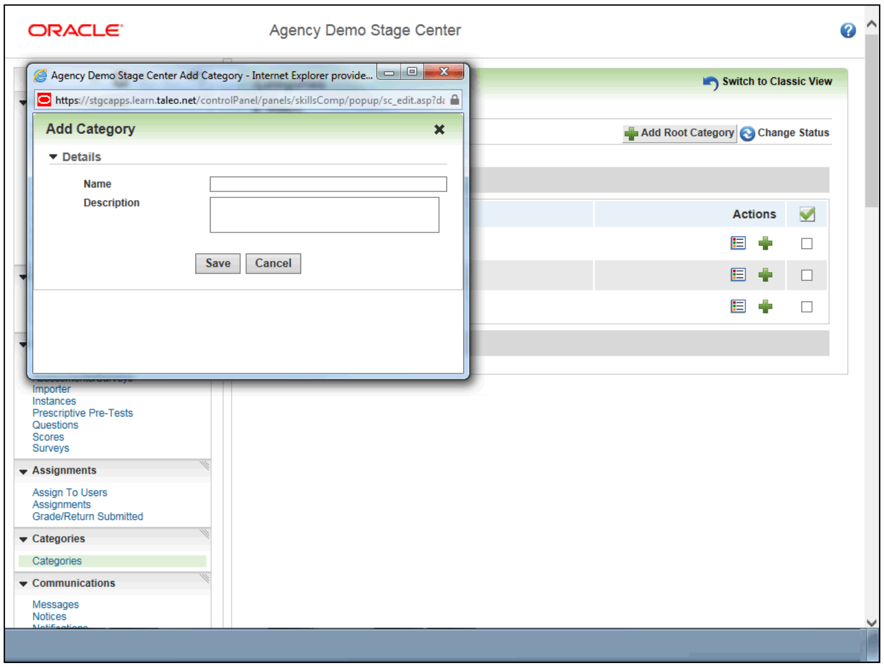
Step	Action
5.	Click the **Add Root Category** link. 



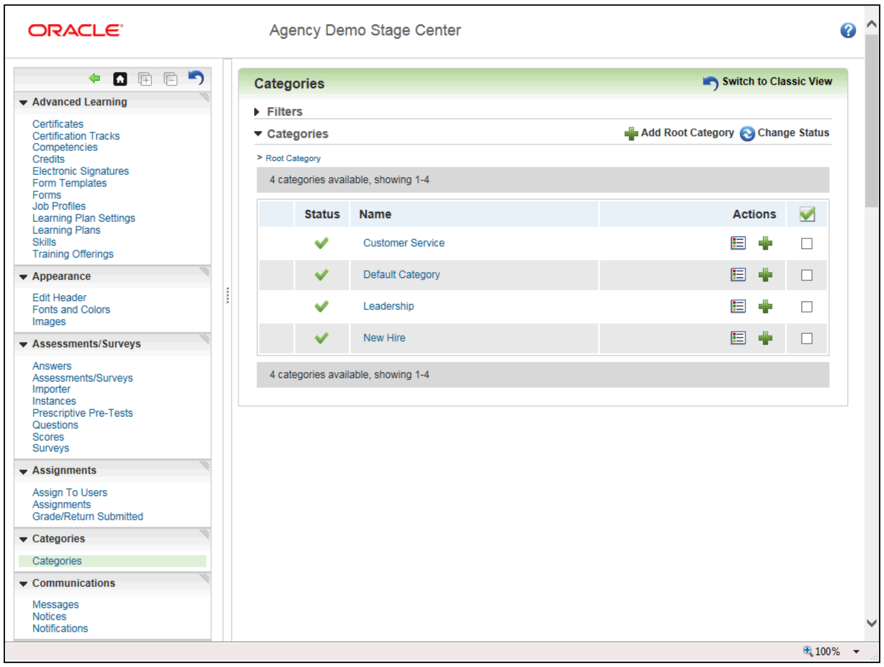
Step	Action
6.	Enter the desired information into the **Name** field. Enter "**Leadership**". Name
7.	Click the **Save** button. Save

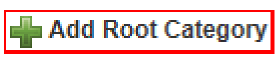


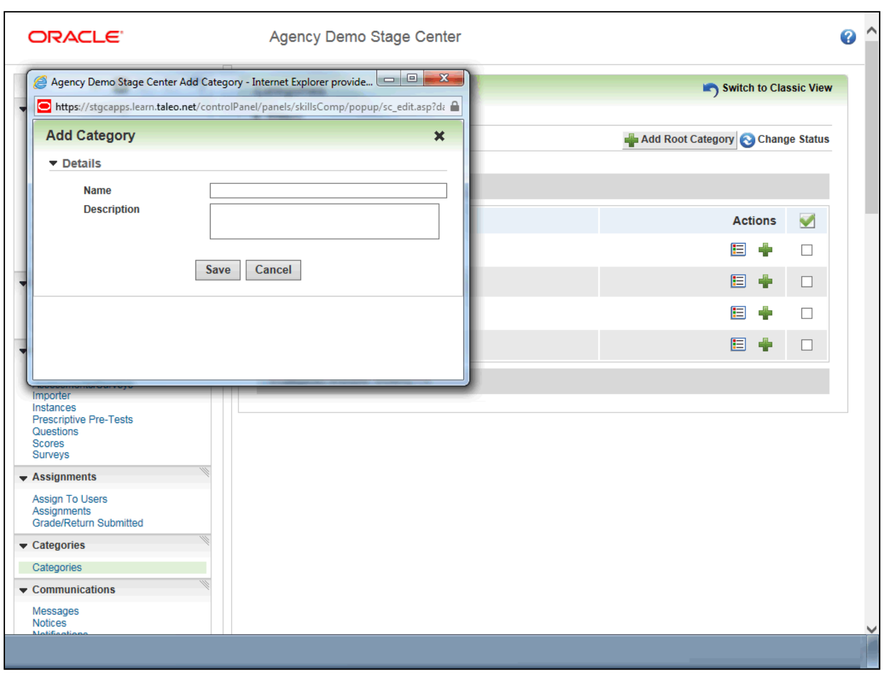
Step	Action
8.	Click the **Add Root Category** link. Add Root Category



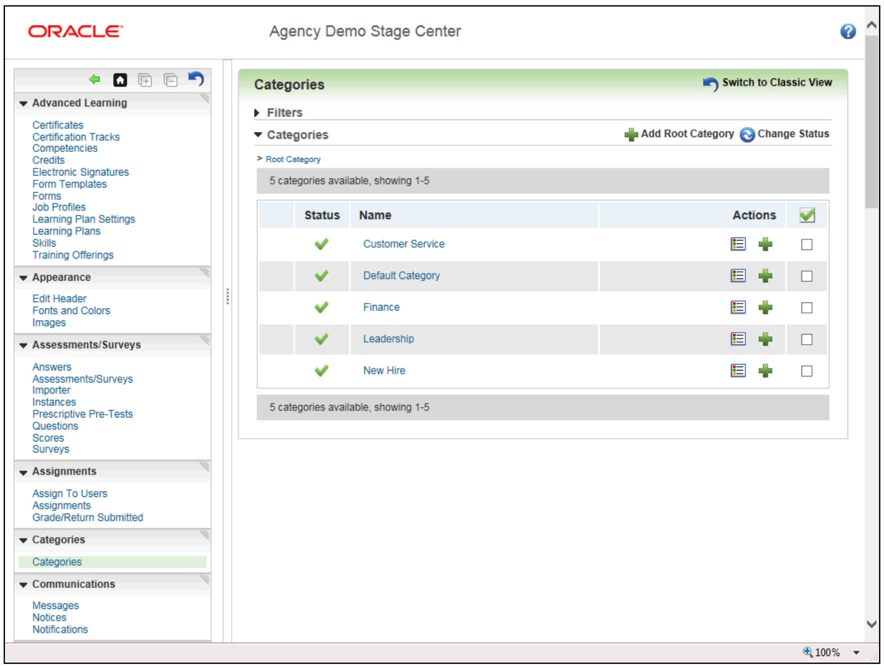
Step	Action
9.	Enter the desired information into the **Name** field. Enter "**Customer Service** ". 
10.	Click the **Save** button. 



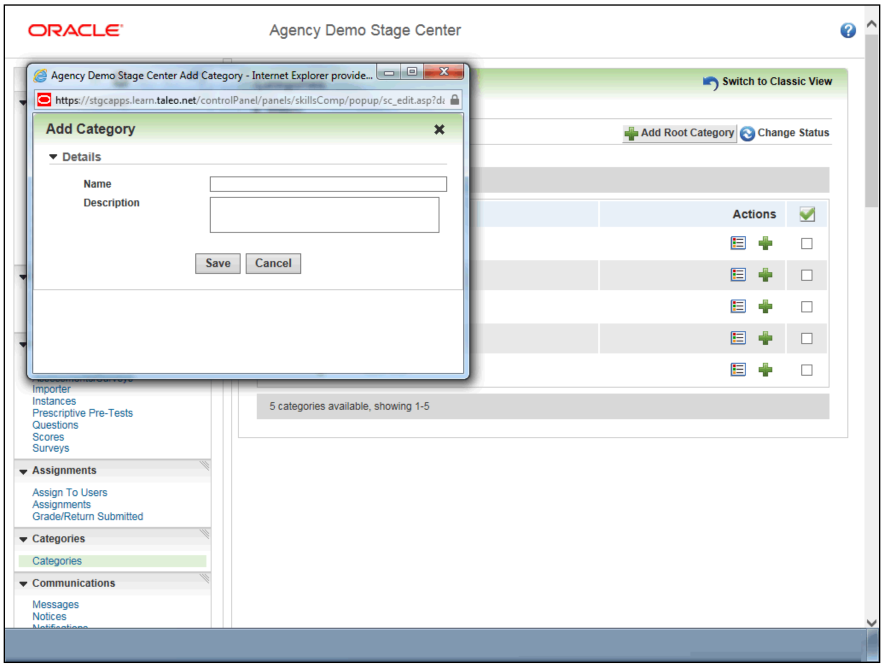
Step	Action
11.	Click the **Add Root Category** link. 



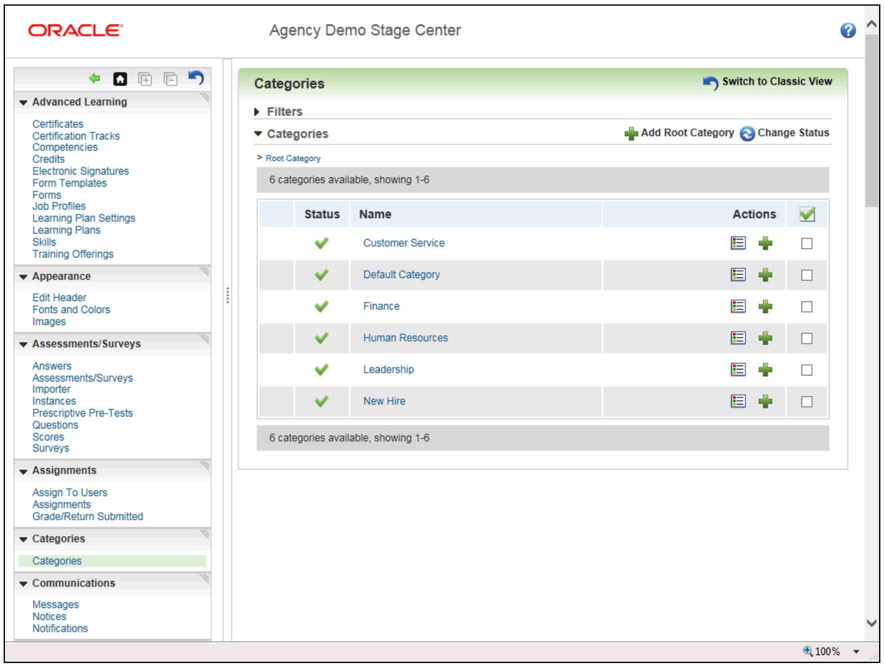
Step	Action
12.	Enter the desired information into the **Name** field. Enter "**Finance**". Name
13.	Click the **Save** button. Save



Step	Action
14.	Click the **Add Root Category** link. Add Root Category



Step	Action
15.	Enter the desired information into the **Name** field. Enter "**Human Resources**". Name
16.	Click the **Save** button. Save



Step	Action
17.	Click the **Control Panel Home** button. 
18.	Congratulations! You have completed this lesson. **End of Procedure.**

Creating Instances

Section 2 - Lesson 2, Exercise 6 - **Creating Instances**

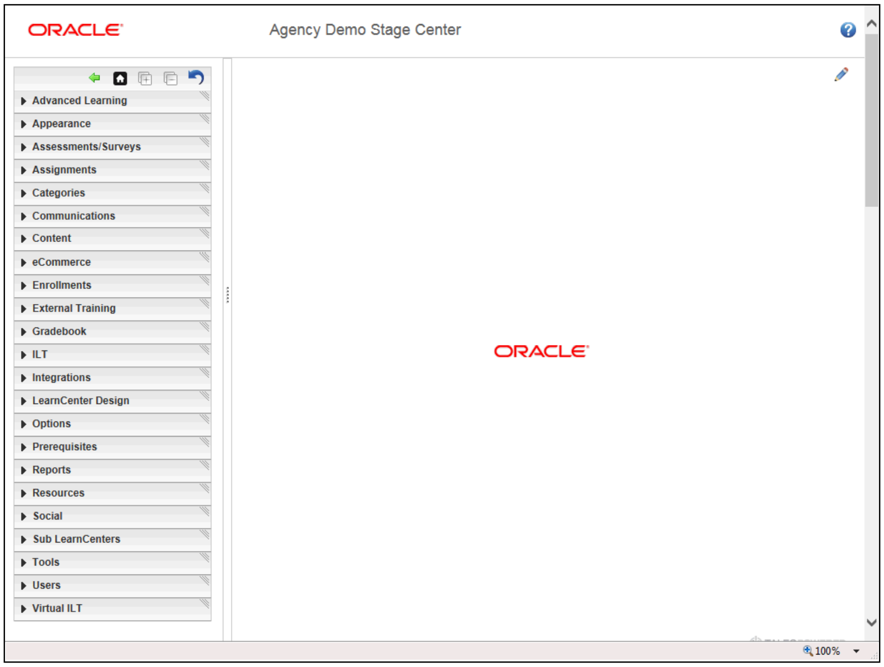
An instance is a set of properties that defines how an Assessment behaves. A single Assessment can have multiple instances so that Assessment can behave differently in different situations.

The properties options differ depending on whether the test is serving as an Assessment, Survey, or Appraisal. Instance properties also differ for Assessments depending on whether it's a Pre-Test, In-Course Test, or Post-Test.

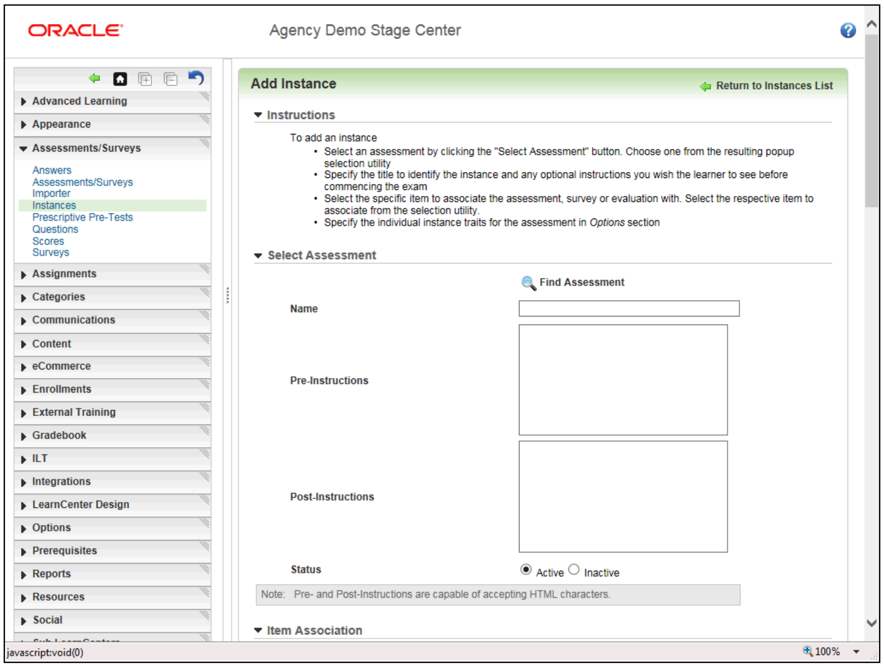
Creating an Instance also creates a "snapshot" of the mapped Assessment and all mapped Questions and Answers. Every time the Instance is administered, the snapshot is utilized in displaying the Questions and Answers. Any subsequent changes made to manually mapped Questions or Answers will not be reflected unless you add a new instance.

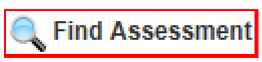
Procedure

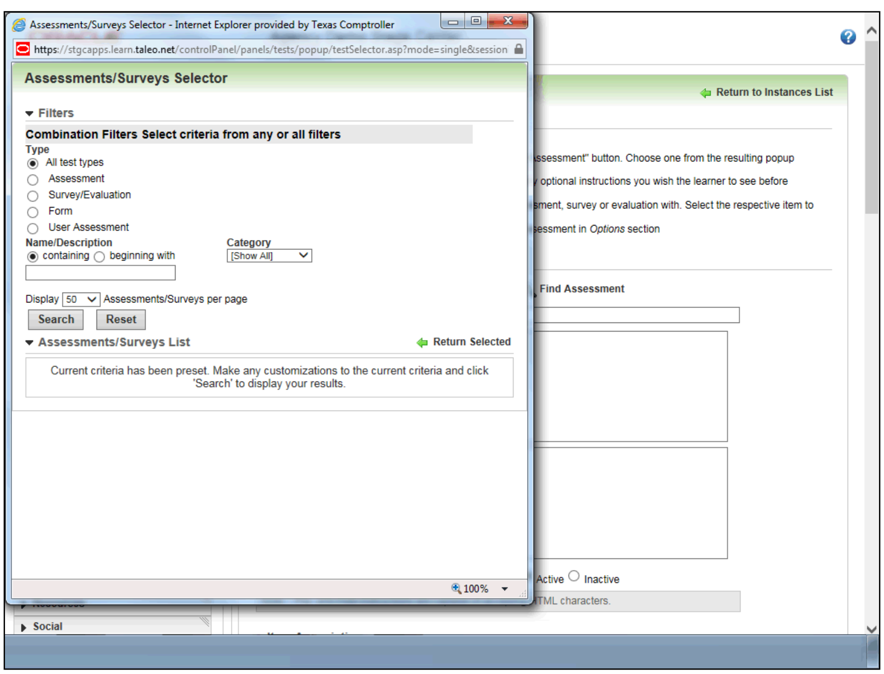
In this lesson, you will learn how to create a CST Instance that will map to an assessment.



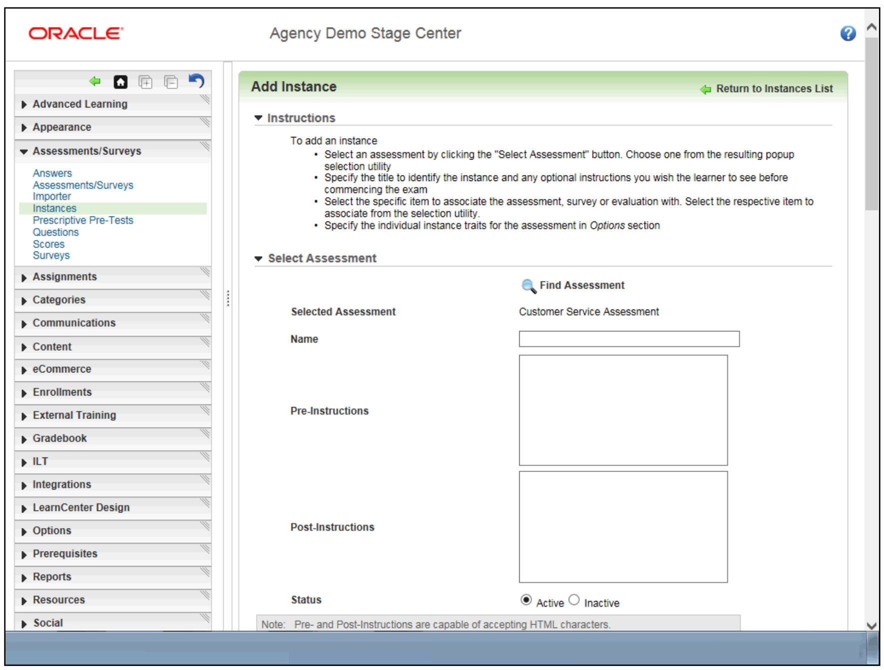
Step	Action
1.	Click the **Assessments/Surveys** menu bar. Assessments/Surveys
2.	Click the **Instances** link. Instances
3.	Click the **Add Instance** link. Add Instance



Step	Action
4.	Click the **Find Assessment** link. 

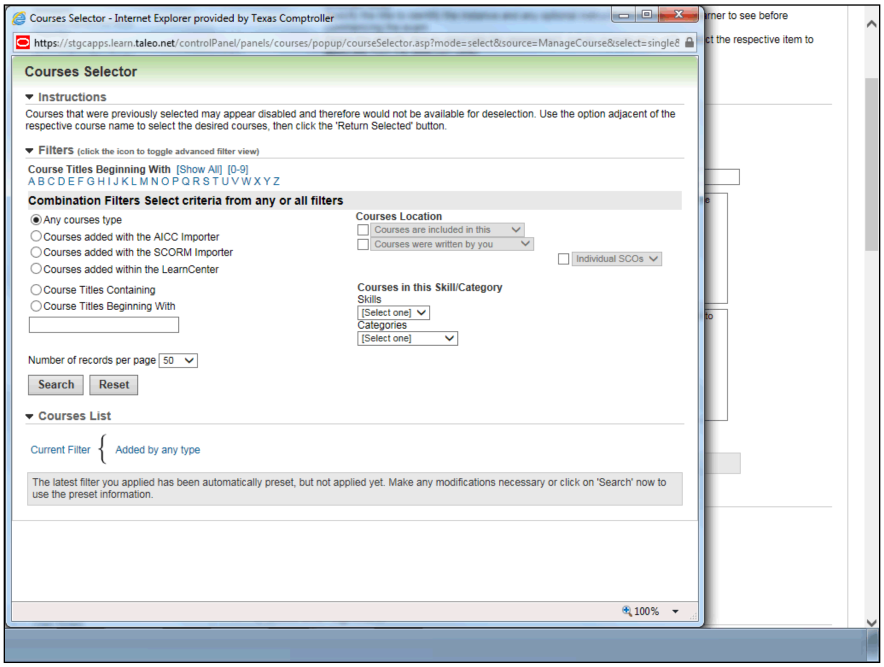


Step	Action
5.	Click the **Search** button. Search
6.	Click the **Customer Service Assessment** option. Customer Service Assessment
7.	Click the **Return Selected** link. Return Selected

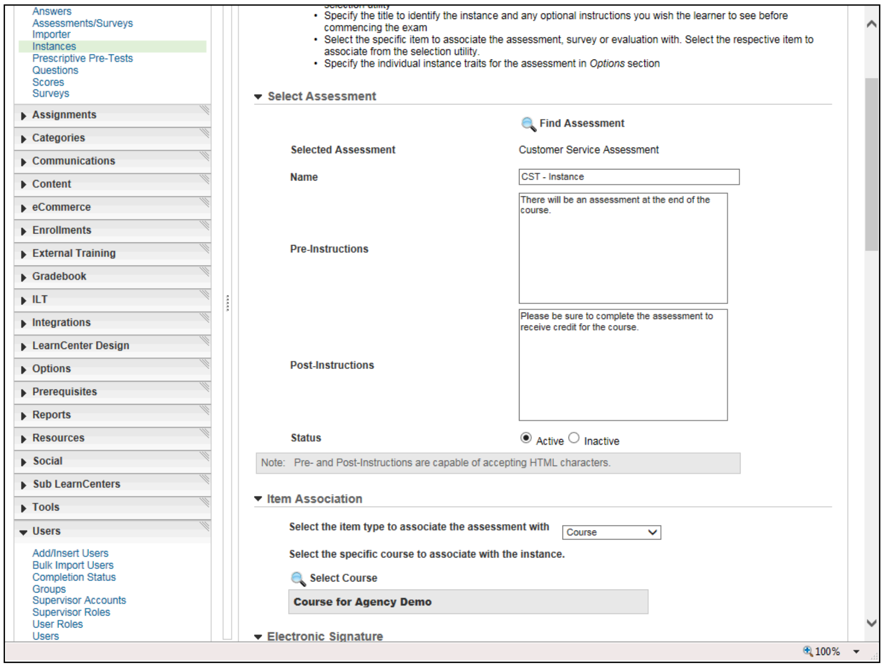


Step	Action
8.	Enter the desired information into the **Name** field. Enter "**CST - Instance**". Name

Step	Action
9.	Enter the desired information into the **Pre-Instructions** field. Enter "**There will be an assessment at the end of the course.**". Pre-Instructions
10.	Enter the desired information into the **Post-Instructions** field. Enter "**Please be sure to complete the assessment to receive credit for the course.**". Post-Instructions
11.	Click the scrollbar.
12.	Click the **Select the item type to associate the assessment with** list. Select the item type to associate the assessment with [Select one]
13.	Click the **Course** list item. Course
14.	Click the **Select Course** link. Select Course



Step	Action
15.	Click the **Search** button. Search
16.	Click the **Open** option.
17.	Click the **Return Selected** link. Return Selected



Step	Action
18.	Click the scrollbar.
19.	Click the scrollbar.
20.	Enter the desired information into the **Limit # of submissions** field. Enter "**1**". Limit # of submissions 0
21.	Click the **Type of assessment:** list. Type of assessment: [Select one]
22.	Click the **Post-test** list item. Post-test
23.	Click in the **Show results - Yes** field. Show results No Yes
24.	Click in the **Required: Yes** field. Required: No Yes
25.	Click in the **Score of record for course - Yes** field. Score of record for course No Yes
26.	Enter the desired information into the **Minimum passing score for completion (percentage)** field. Enter "**75**". Minimum passing score for completion (percentage) 0

Step	Action
27.	Click the scrollbar.
28.	Click the **Save** button. Save
29.	Click the **Control Panel Home** button.
30.	Congratulations! You have completed this lesson. **End of Procedure.**

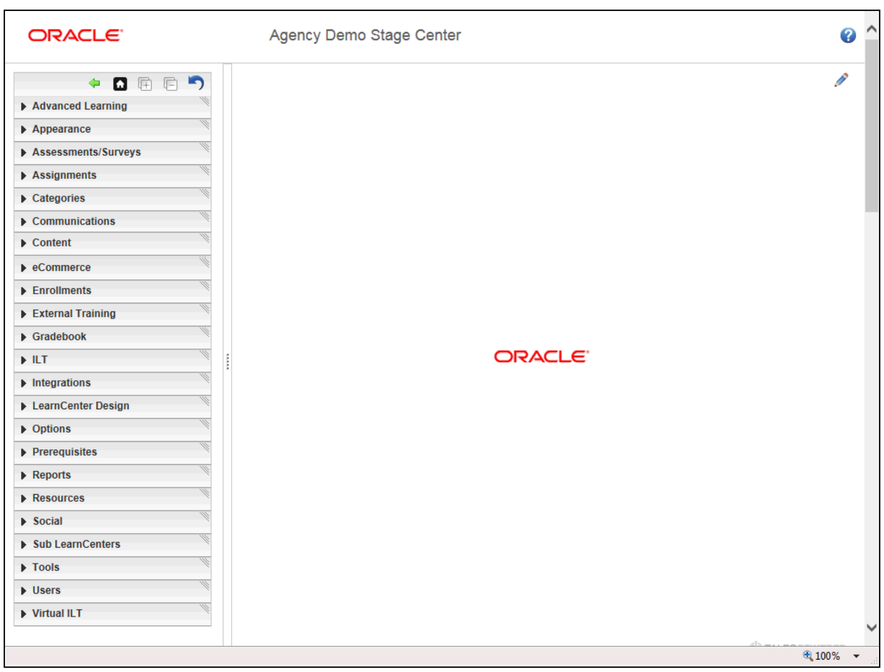
Creating Assignments

Section 2 - Lesson 2, Exercise 7 - **Creating Assignments**

Procedure

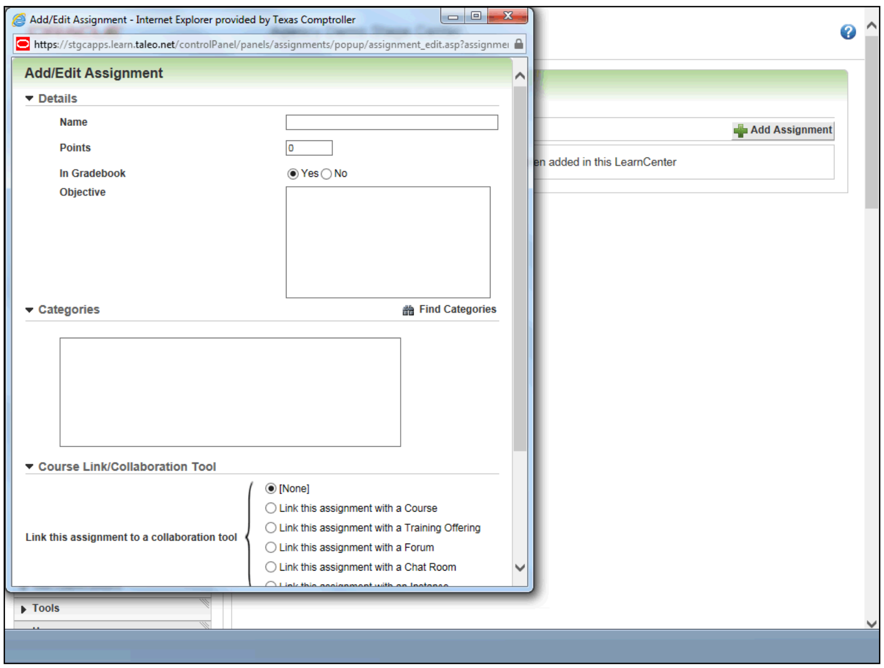
In this lesson, you will learn how to create an Assignment.

The assignment name: CST - Assignment



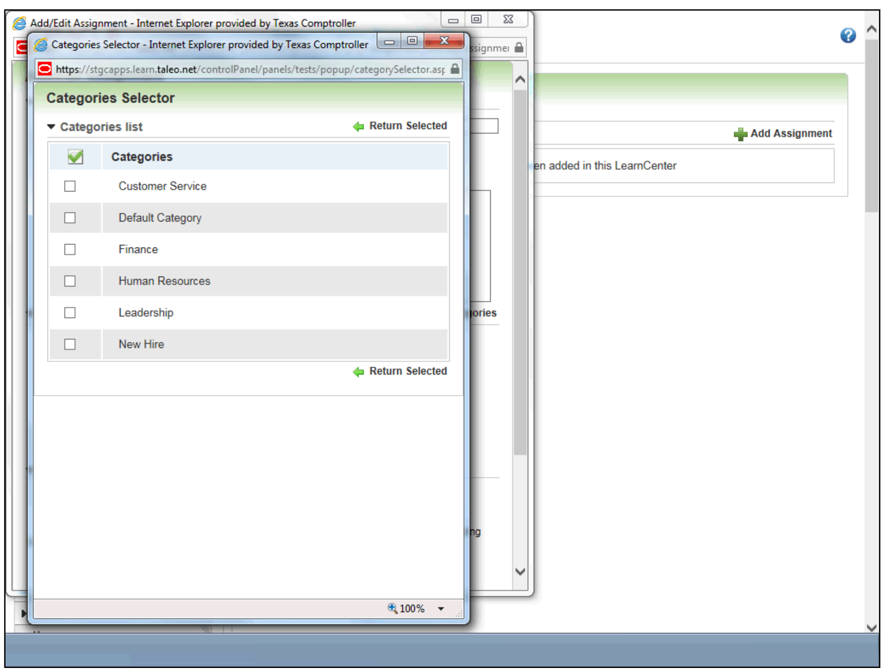
Step	Action
1.	Click the **Assignments** link. Assignments

Step	Action
2.	Click the **Assignments** link. Assignments
3.	Click the **Add Assignment** link. Add Assignment



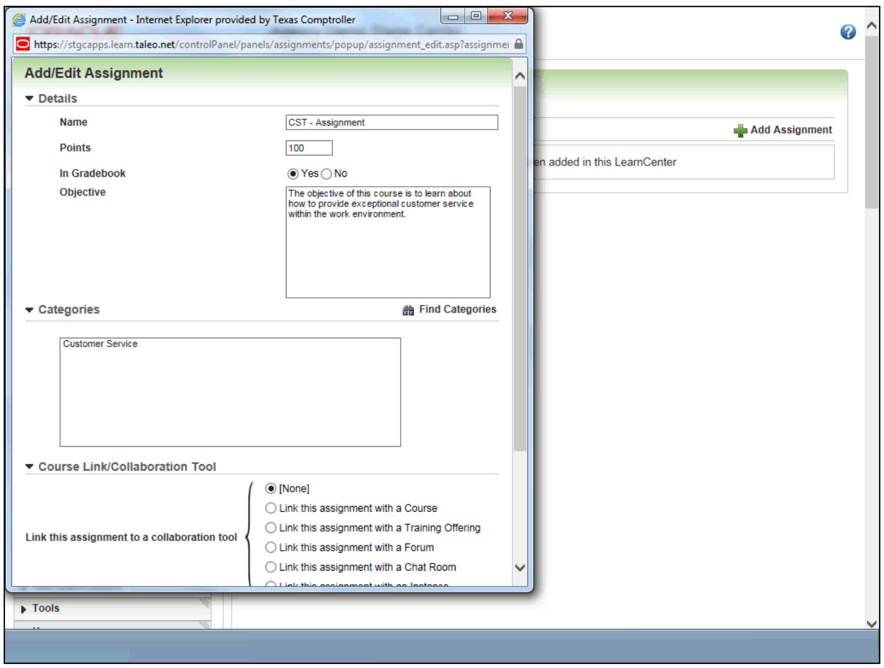
Step	Action
4.	Enter the desired information into the **Name** field. Enter "**CST - Assignment**". Name
5.	Enter the desired information into the **Points** field. Enter "**100**". Points 0

Step	Action
6.	Enter the desired information into the **Objective** field. Enter "**The objective of this course is to learn about how to provide exceptional customer service within the work environment.**".
7.	Categories should have already been created in the Category table. You will select from an existing Category. Click the **Find Categories** link. Find Categories

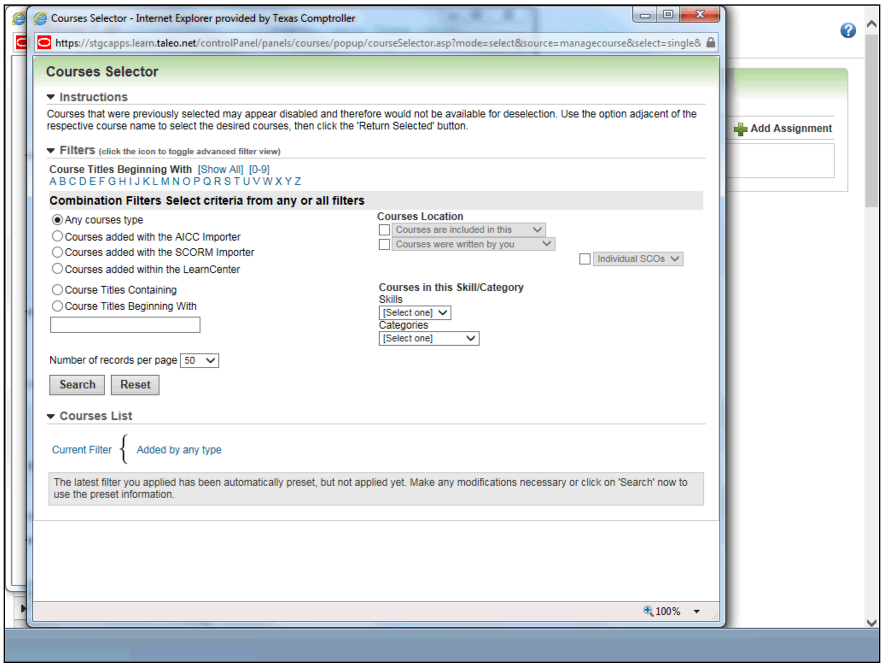


Step	Action
8.	Click the **Customer Service** option. Customer Service

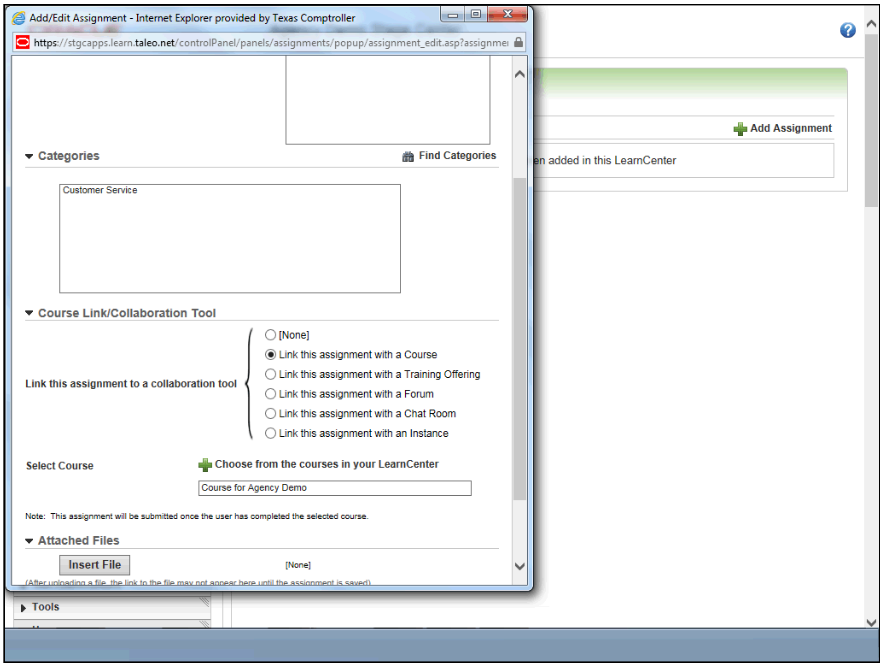
Step	Action
9.	Click the **Return Selected** link. Return Selected

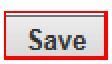


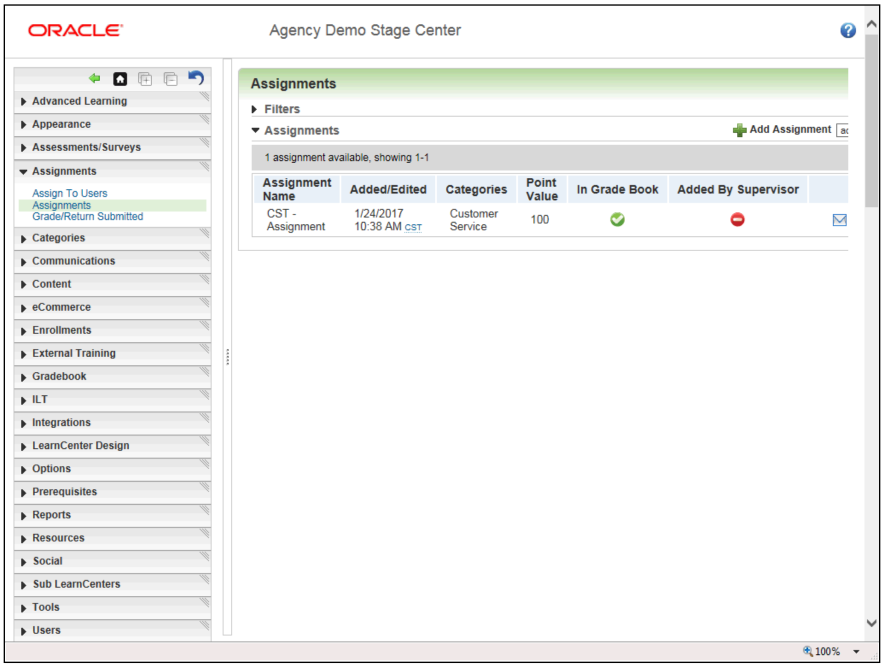
Step	Action
10.	Click the scrollbar.
11.	Click the **Link this assignment with a Course** option. Link this assignment with a Course
12.	Click the **Choose from the courses in your LearnCenter** link. Choose from the courses in your LearnCenter



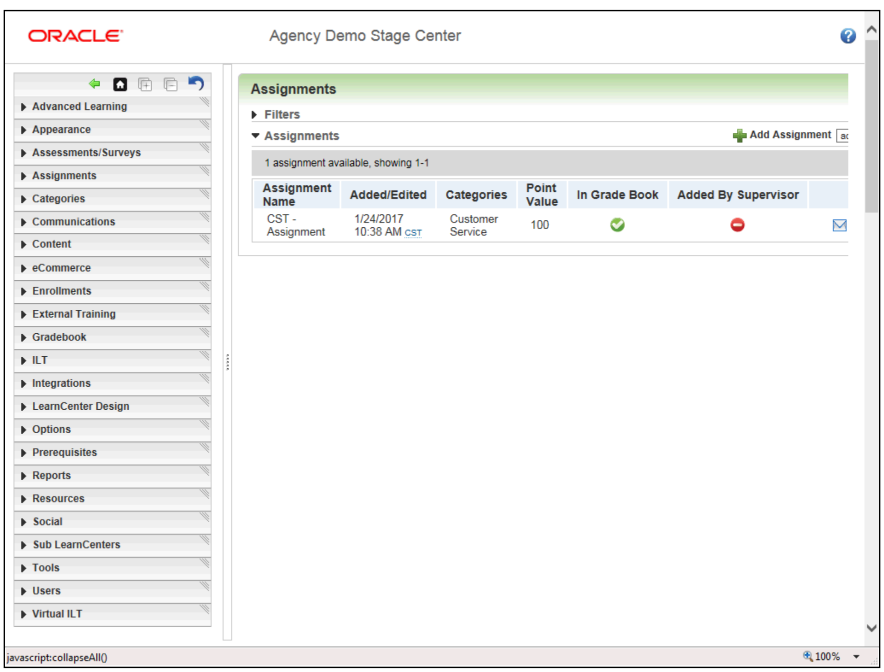
Step	Action
13.	Click the **Search** button. Search
14.	Click the **Course for Agency Demo** option.
15.	Click the **Return Selected** link. Return Selected



Step	Action
16.	Click the scrollbar.
17.	Click the scrollbar.
18.	Click the **Save** button. 
19.	The assignment is added.



Step	Action
20.	Click the **Collapse** button. 



Step	Action
21.	Click the **Control Panel Home** button.
22.	Congratulations! You have completed this lesson. **End of Procedure.**

Creating Questions/Answers Pool

Section 2 - Lesson 2, Exercise 8 - **Creating Questions/Answers Pool**

Question Types

There are several types of Questions you can add for Assessments/Surveys:

- **Fill in the Blank** - This Question type requires the User to input text. The field is not case sensitive, but spelling and grammar inconsistent with the correct Answer will be marked as incorrect.

  Example: The ________ is Taleo Learn's Learning Management System.

- **Single Select** - This Question type displays a check box response that offers only one check box.

  Example: "Check here if we can share your responses with the instructor."

- **Multiple Choice, Single Select** - This Question type displays multiple Answers with option buttons. Only one Answer can be selected and only one Answer is defined as the correct Answer.

  Example: The keyboard is a:
  A) Display device
  B) Input device
  C) Printer

- **Multiple Choice, Multiple Select** - This Question type displays multiple Answers with check boxes. More than one Answer can be selected and more than one Answer can be defined as correct.

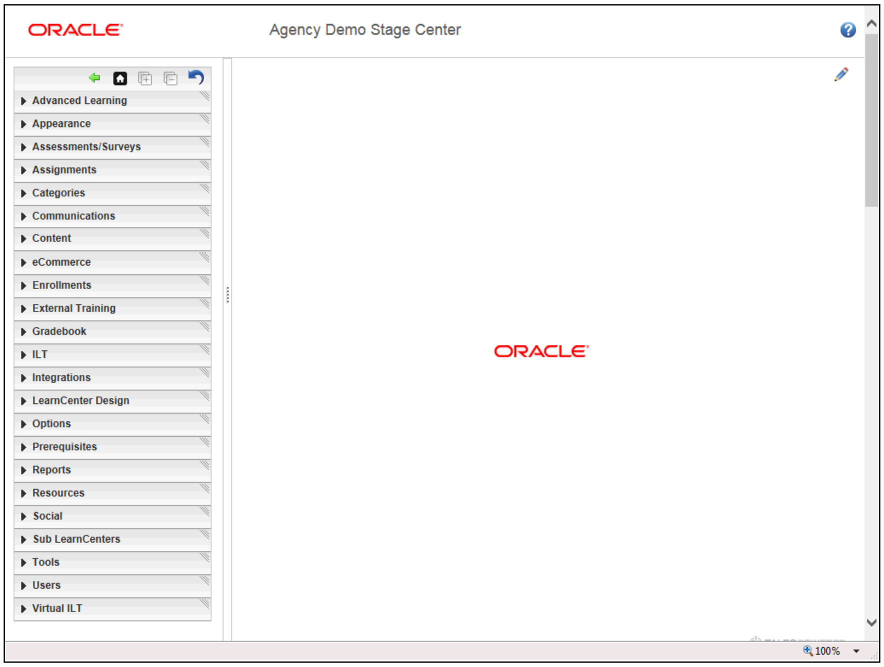
  Example: Which roles best describe your LearnCenter responsibilities:
  A) ILT Administrator
  B) Content Developer
  C) Instructor
  D) Web Designer

- **Free Response** - This Question type provides a text box for Users to enter a response. Free-response Questions are not graded, but Users' responses are recorded. Up to 500 characters can be entered.

  Example: "Please use the space below."

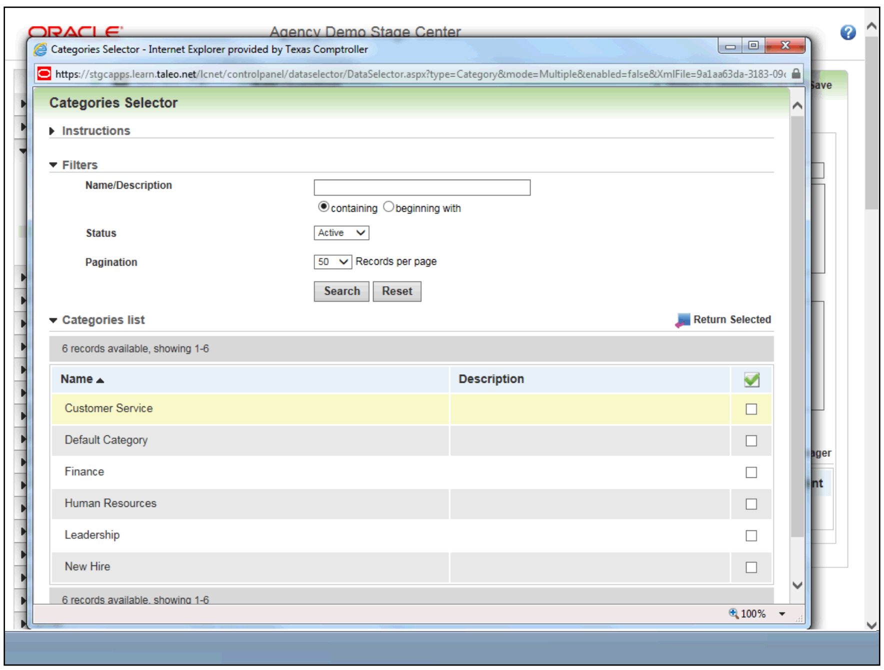
Procedure

In this lesson, you will learn how to create a Questions and Answers Pool.

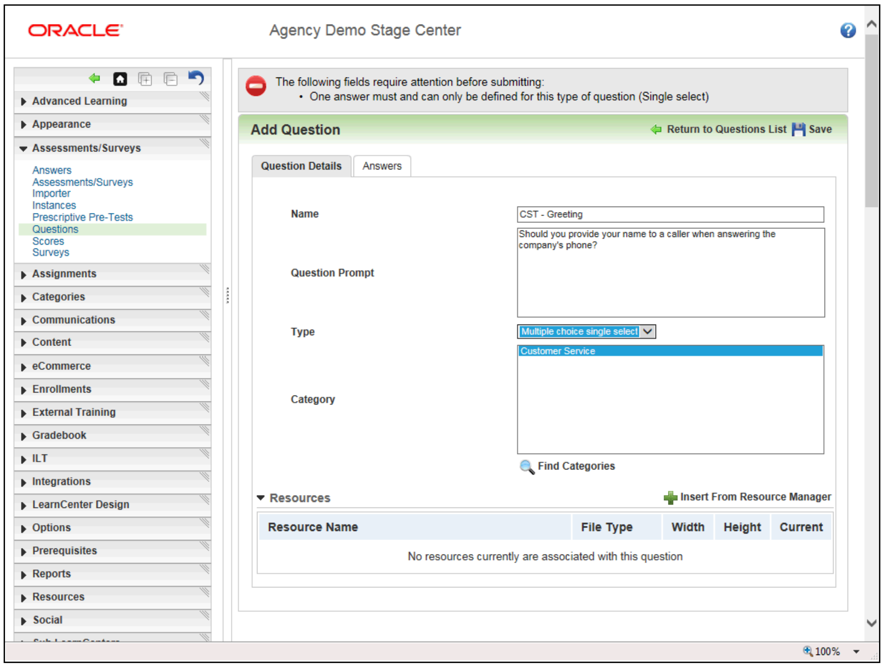


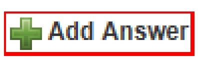
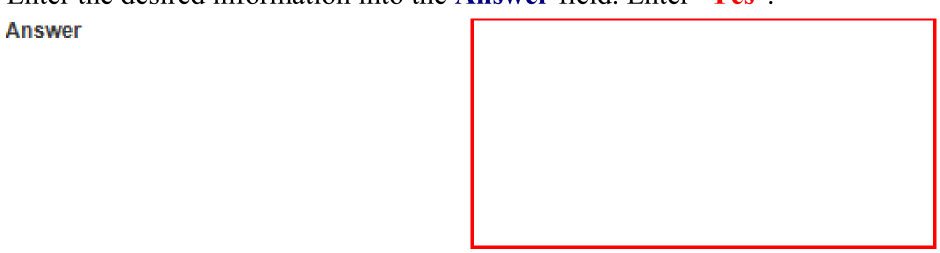
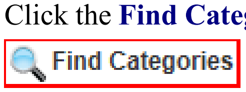
Step	Action
1.	Click the **Assessments/Surveys** link. Assessments/Surveys
2.	Click the **Questions** link. Questions
3.	Click the **Add Question** link. Add Question
4.	Enter the desired information into the **Name** field. Enter "**CST - Greeting**". Name
5.	Enter the desired information into the **Question Prompt** field. Enter "**Should you provide your name to a caller when answering the company's phone?**". Question Prompt

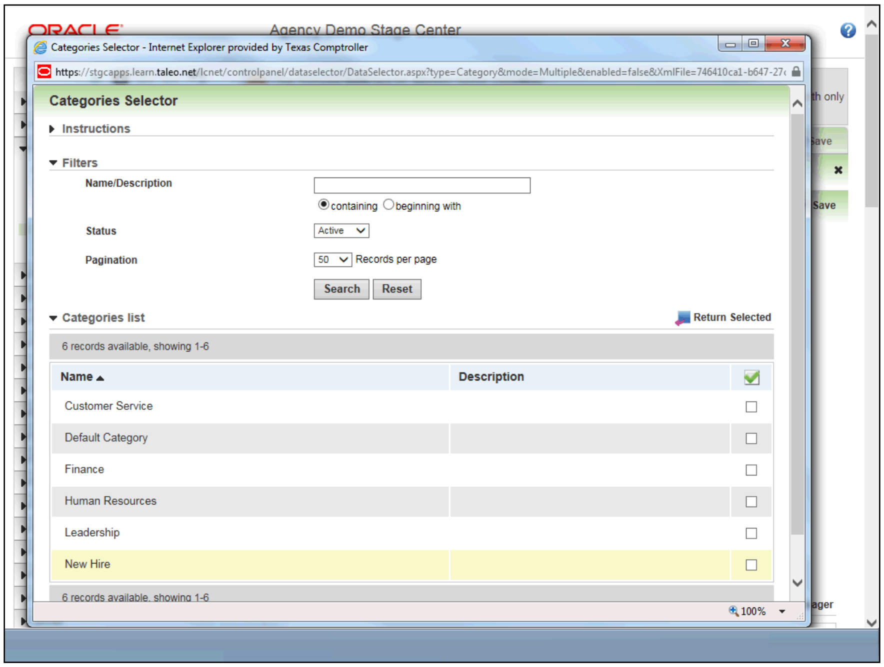
Step	Action
6.	Click the **Type** list. Type [Select one]
7.	Click the **Multiple choice single select** list item. Multiple choice single select
8.	Click the **Find Categories** link. Find Categories



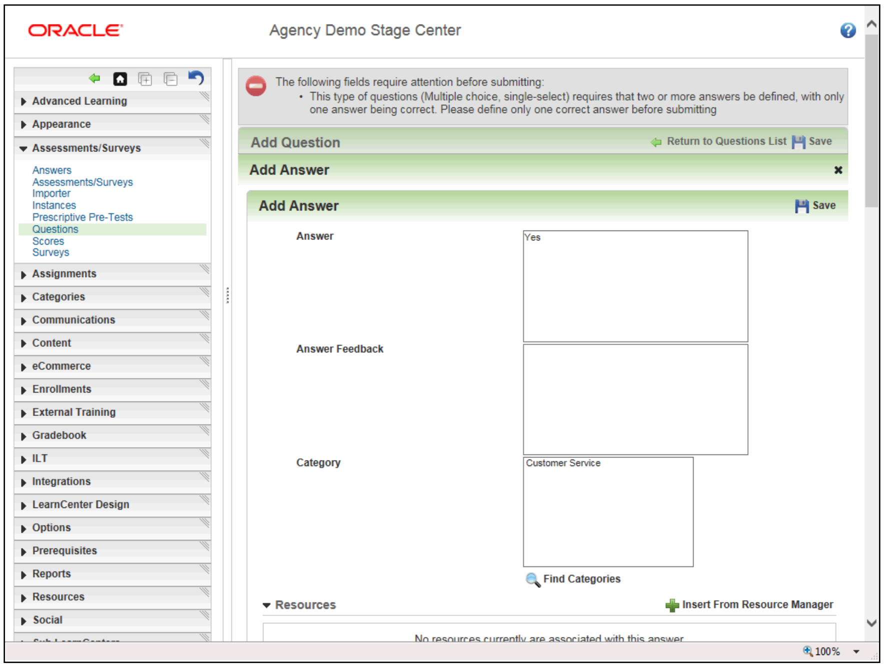
Step	Action
9.	Click the **Customer Service** option. Customer Service
10.	Click the **Return Selected** link. Return Selected

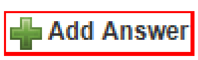
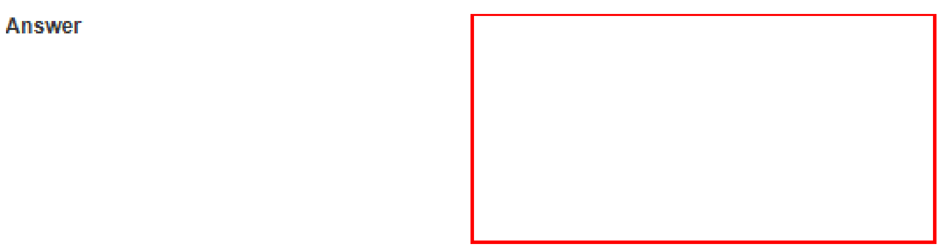


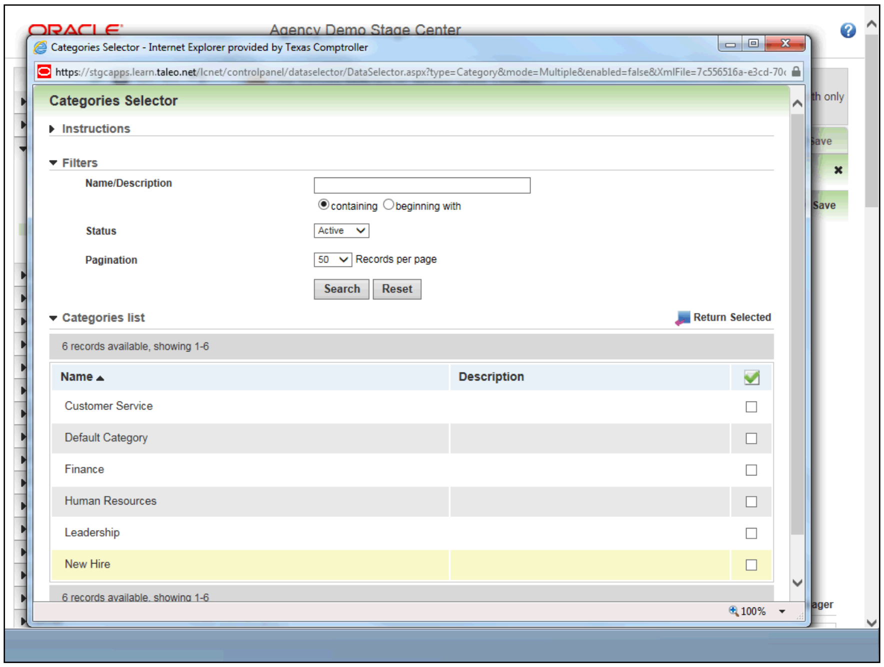
Step	Action
11.	Click the **Answers** link. 
12.	Click the **Add Answer** link. 
13.	Enter the desired information into the **Answer** field. Enter "**Yes**". 
14.	Click the **Find Categories** link. 



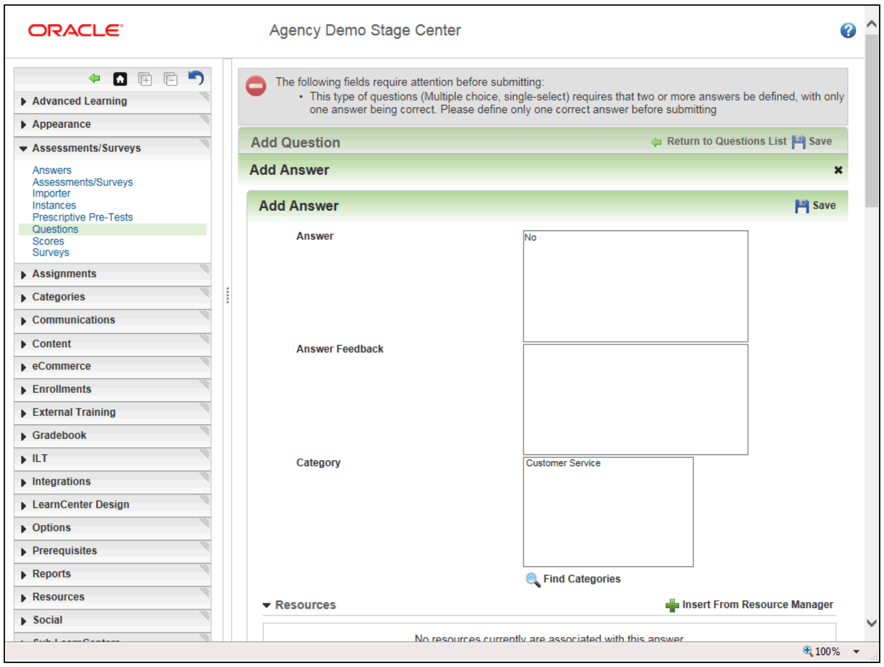
Step	Action
15.	Click the **Customer Service** option. Customer Service
16.	Click the **Return Selected** link. Return Selected



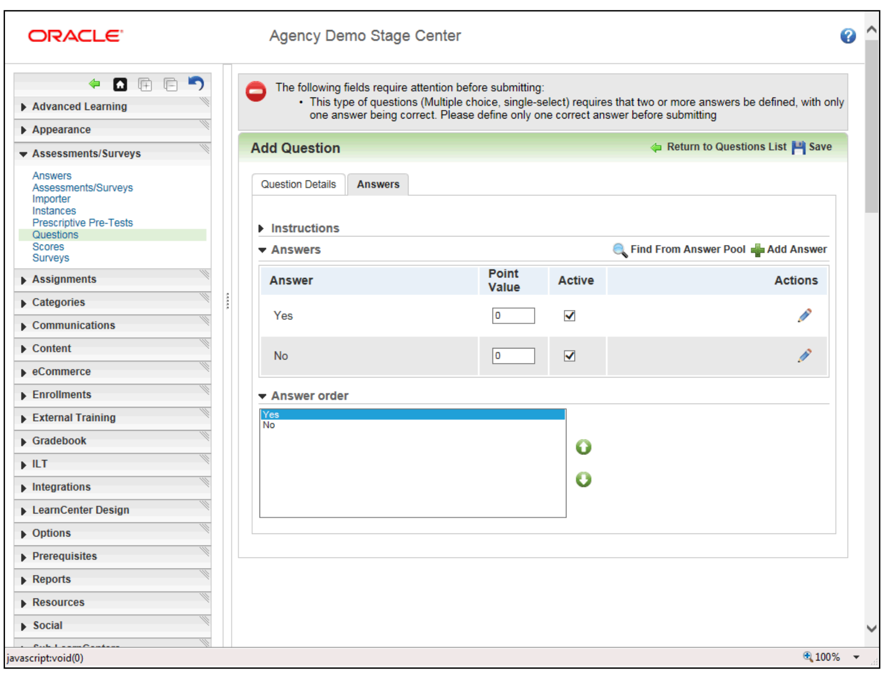
Step	Action
17.	Click the **Save** link. 
18.	Click the **Add Answer** link. 
19.	Enter the desired information into the **Answer** field. Enter "**No**". 
20.	Click the **Find Categories** button. 



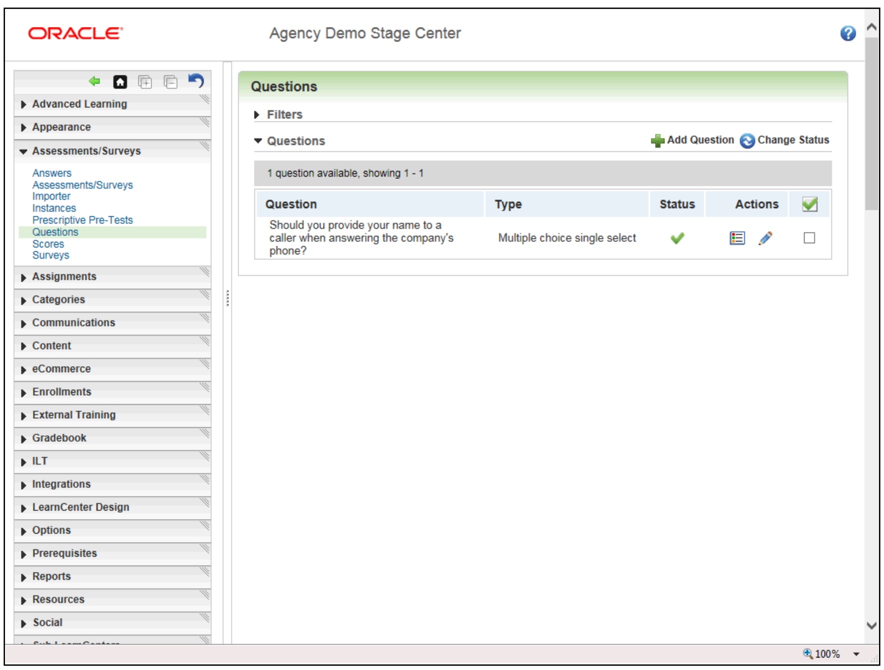
Step	Action
21.	Click the **Customer Service** option. Customer Service
22.	Click the **Return Selected** link. Return Selected



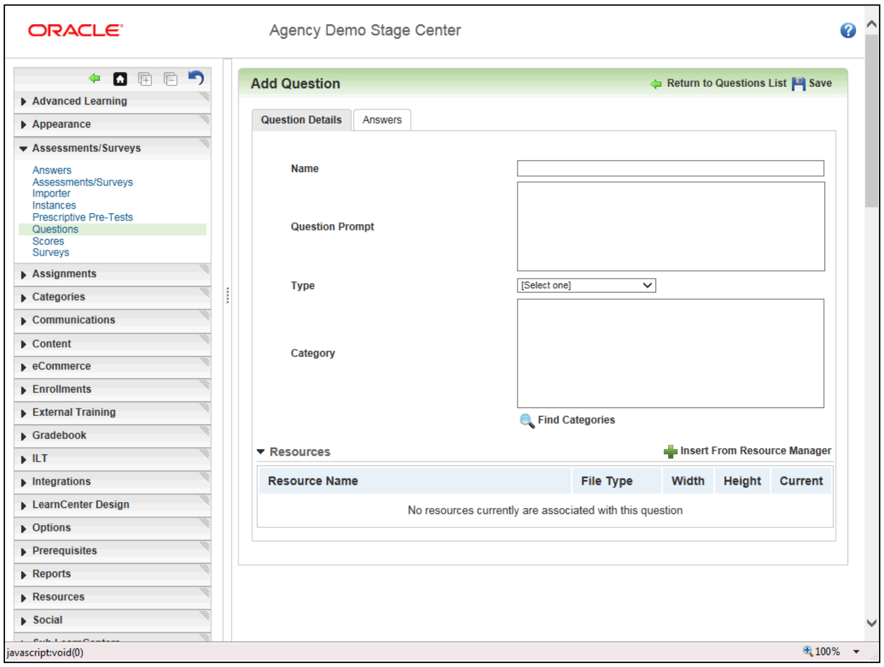
Step	Action
23.	Click the **Save** link. 



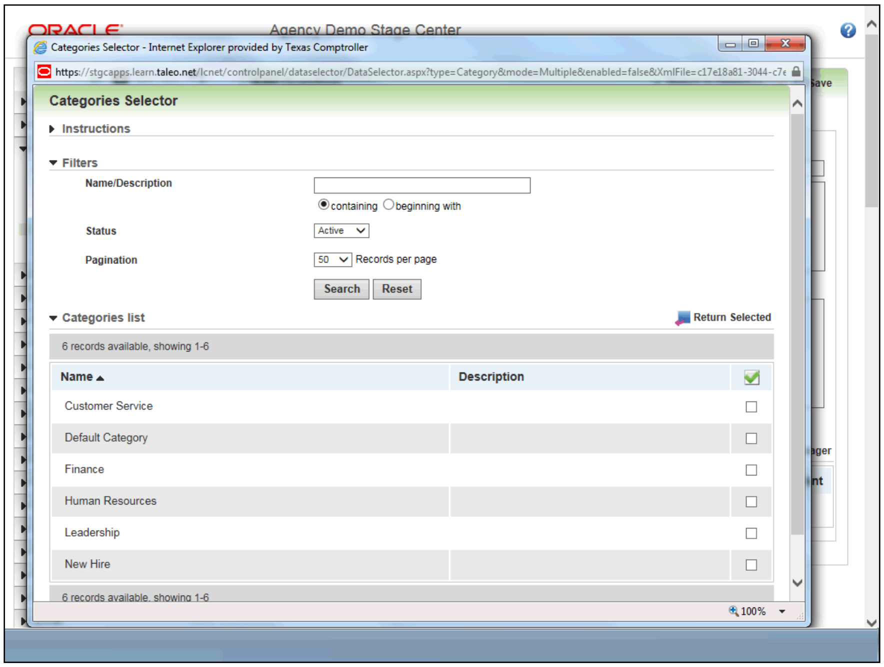
Step	Action
24.	Enter the desired information into the **Yes** field. Enter "**100**". Yes 0
25.	Enter the desired information into the **Yes** field. Enter "**99.999**". Yes 99.999
26.	Click the **Save** link. Save
27.	Click the **Return to Questions List** link. Return to Questions List



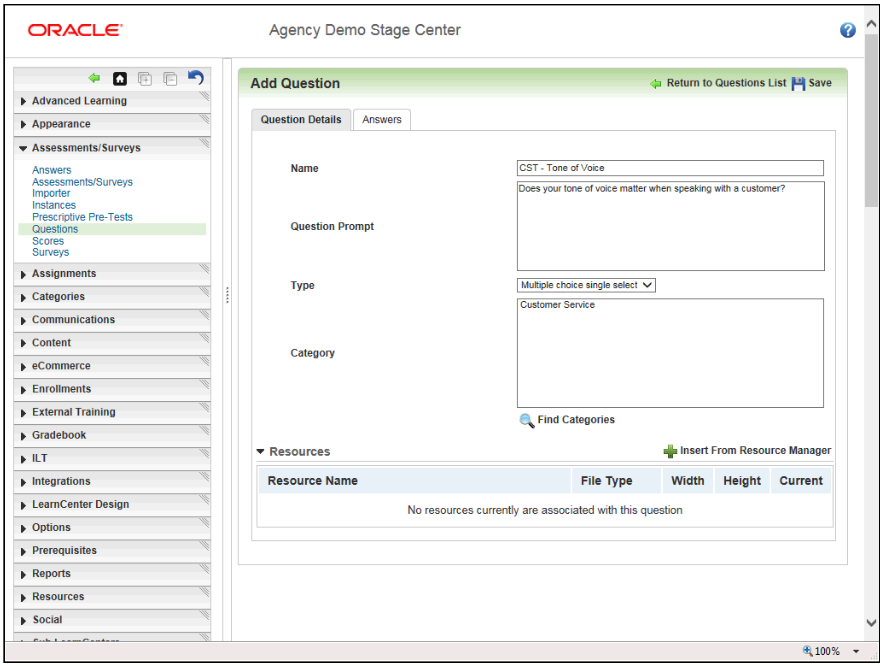
Step	Action
28.	Click the **Add Question** link. Add Question

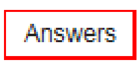
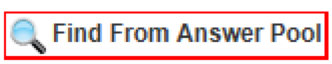


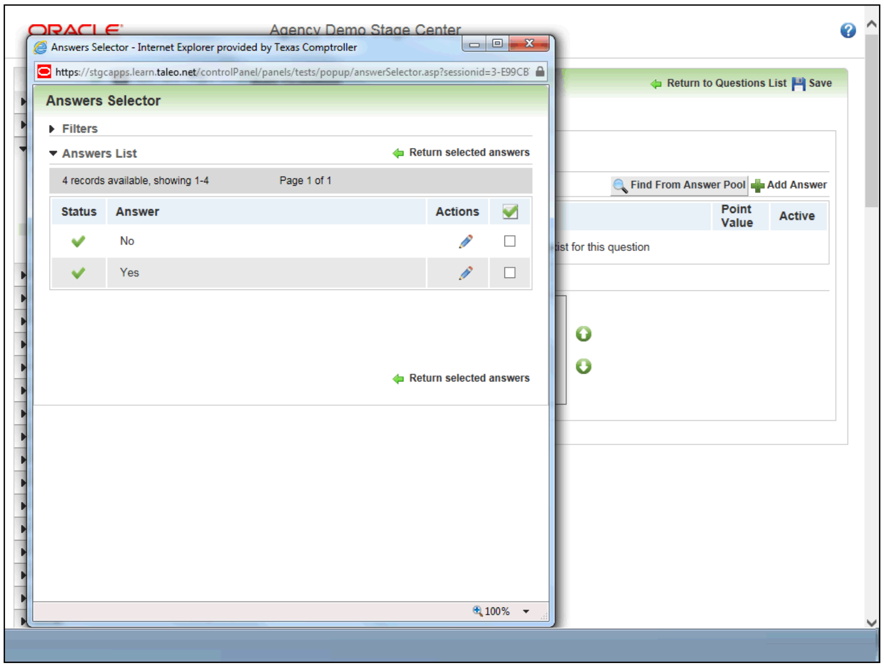
Step	Action
29.	Enter the desired information into the **Name** field. Enter "**CST - Tone of Voice**". Name
30.	Enter the desired information into the **Question Prompt** field. Enter "**Does your tone of voice matter when speaking with a customer?**". Question Prompt
31.	Click the **Type** list. Type [Select one]
32.	Click the **Multiple choice single select** list item. Multiple choice single select
33.	Click the **Find Categories** link. Find Categories

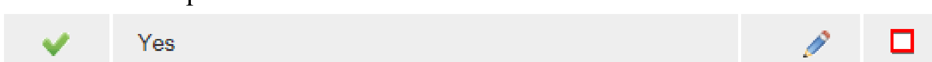
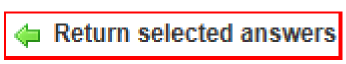


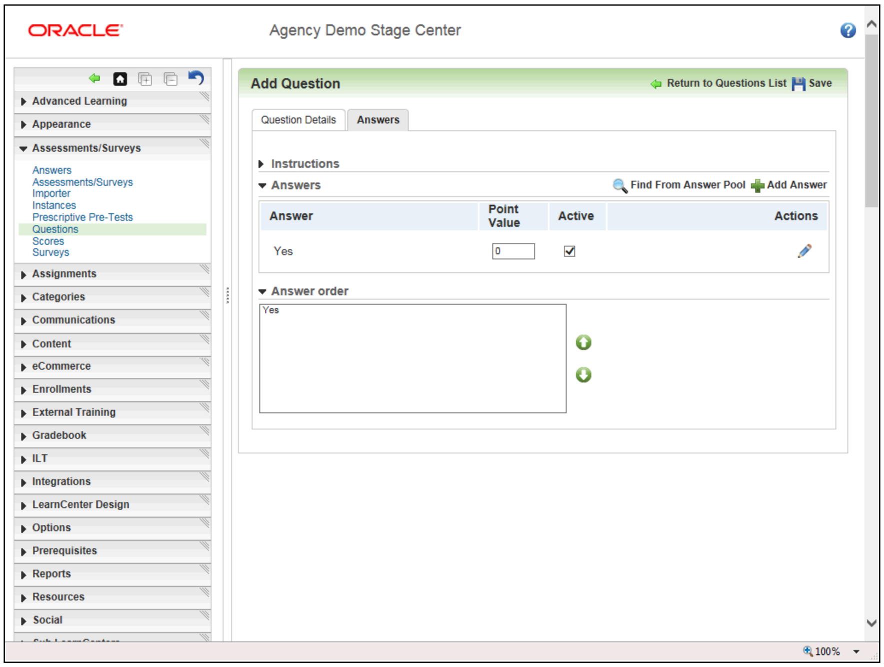
Step	Action
34.	Click the **Customer Service** option. Customer Service
35.	Click the **Return Selected** link. Return Selected



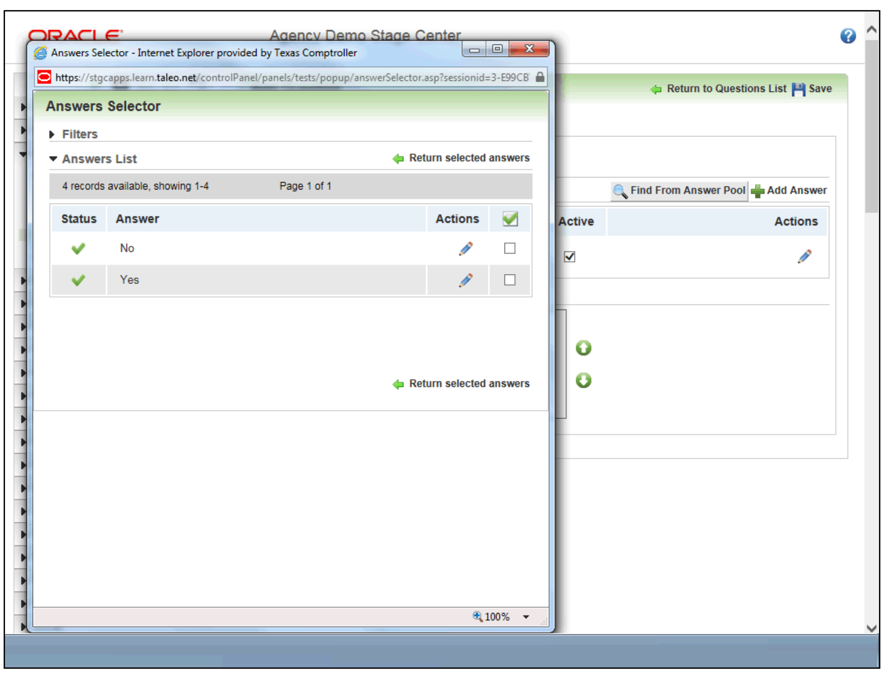
Step	Action
36.	Click the **Answers** link. 
37.	Click the **Find From Answer Pool** link. 



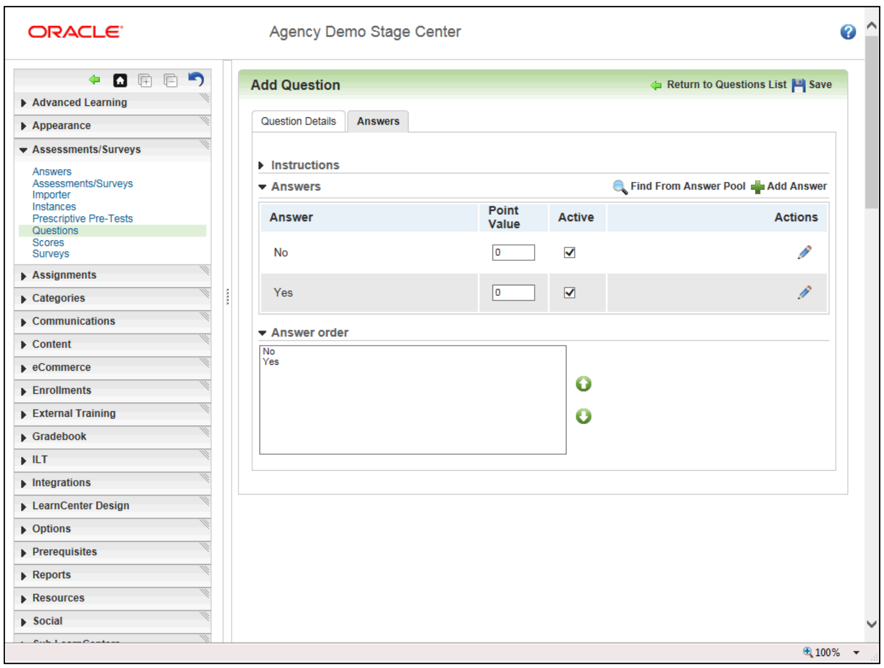
Step	Action
38.	Click the **Yes** option. 
39.	Click the **Return selected answers** link. 



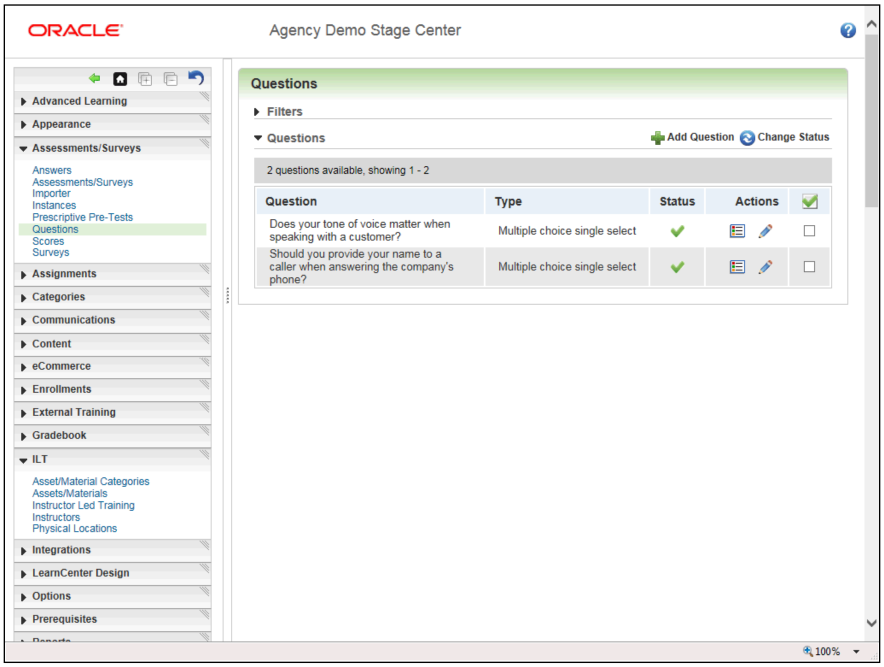
Step	Action
40.	Click the **Find From Answer Pool** link. Find From Answer Pool



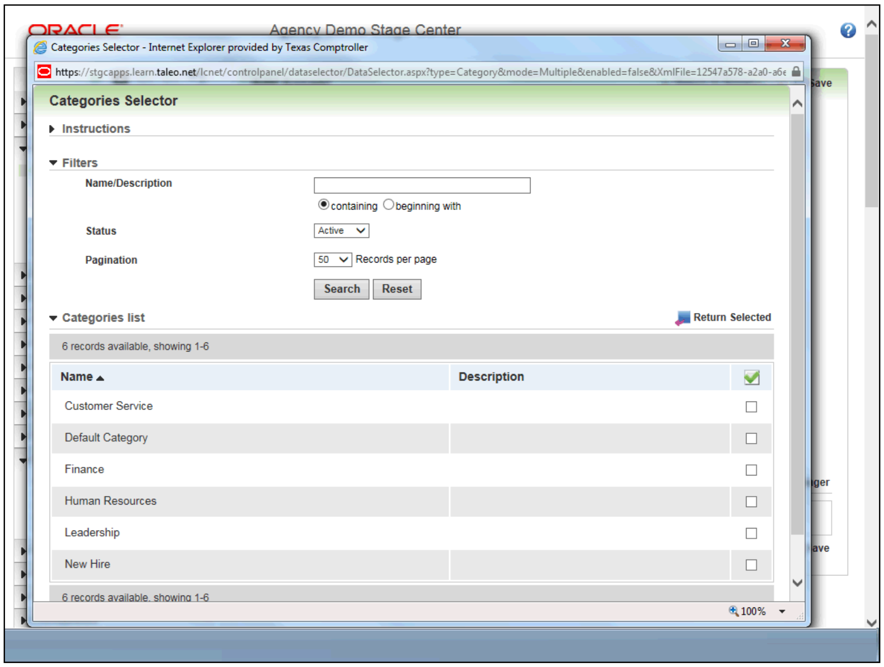
Step	Action
41.	Click the **No** option. No
42.	Click the **Return selected answers** link. Return selected answers



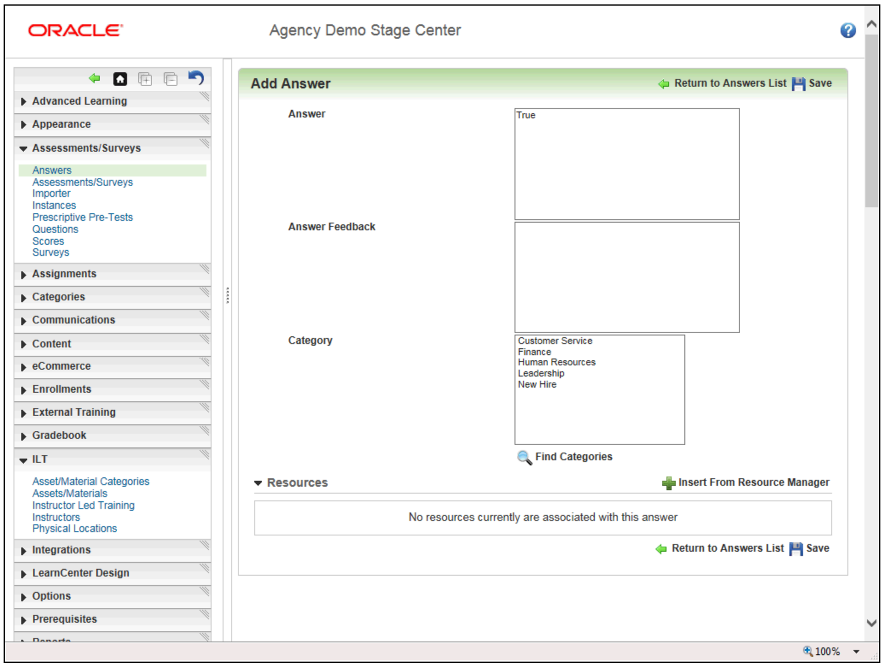
Step	Action
43.	Enter the desired information into the **Yes** field. Enter "**99.9999**". Yes 0
44.	Click the **Save** link. Save
45.	Click the **Return to Questions List** link. Return to Questions List



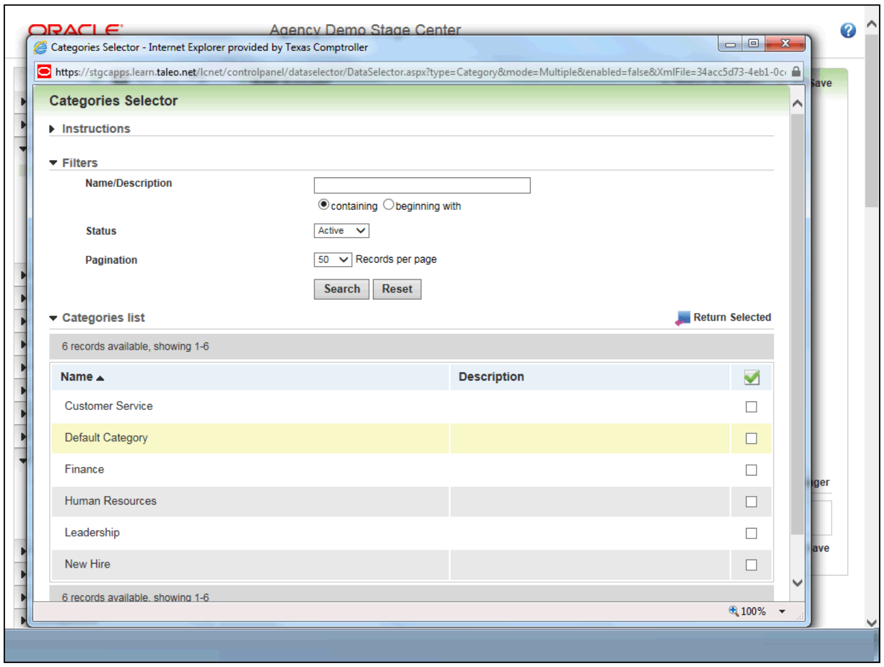
Step	Action
46.	Click the **Answers** link. Answers
47.	Click the **Add Answer** link. Add Answer
48.	Enter the desired information into the **Answer** field. Enter "**True**". Answer
49.	Click the **Find Categories** link. Find Categories



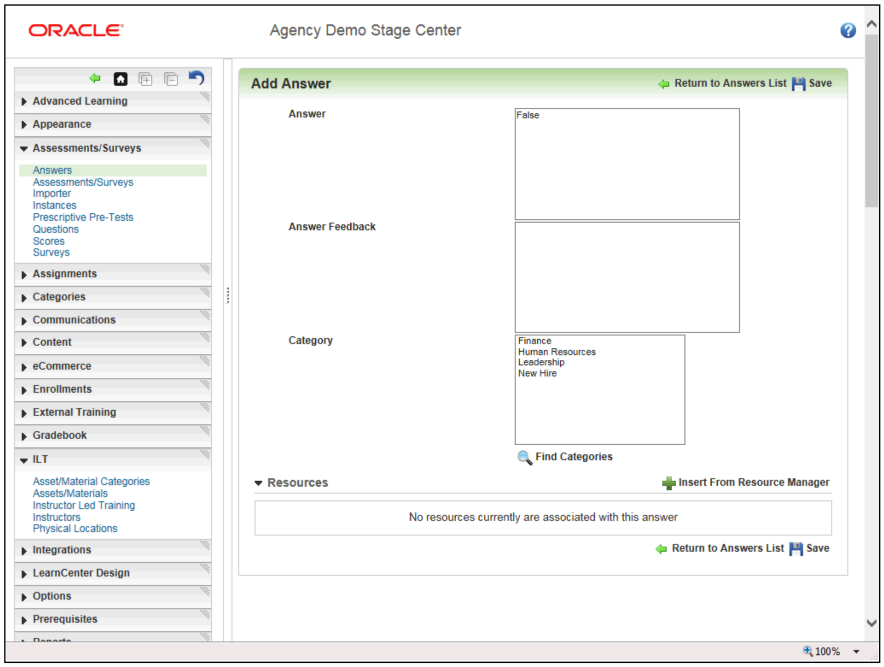
Step	Action
50.	Click the **Customer Service** option. Customer Service
51.	Click the **Finance** option. Finance
52.	Click the **Human Resources** option. Human Resources
53.	Click the **Leadership** option. Leadership
54.	Click the **New Hire** option. New Hire
55.	Click the **Return Selected** link. Return Selected

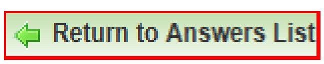


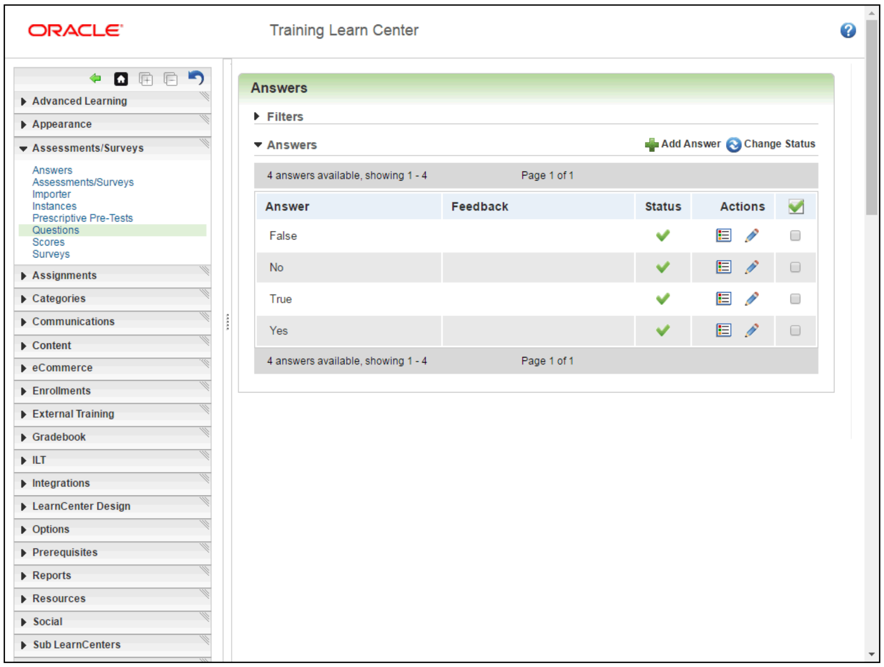
Step	Action
56.	Click the **Save** link. Save
57.	Click the **Return to Answers List** link. Return to Answers List
58.	Click the **Add Answer** link. Add Answer
59.	Enter the desired information into the **Answer** field. Enter "**False**". Answer
60.	Click the **Find Categories** link. Find Categories



Step	Action
61.	Click the **Finance** option. Finance
62.	Click the **Human Resources** option. Human Resources
63.	Click the **Leadership** option. Leadership
64.	Click the **New Hire** option. New Hire
65.	Click the **Return Selected** link. Return Selected



Step	Action
66.	Click the **Save** link. 
67.	Click the **Return to Answers List** link. 



Step	Action
68.	Click the **Collapse** button.
69.	Click the **Home** button.
70.	Congratulations! You have completed this lesson. **End of Procedure.**

Creating Surveys

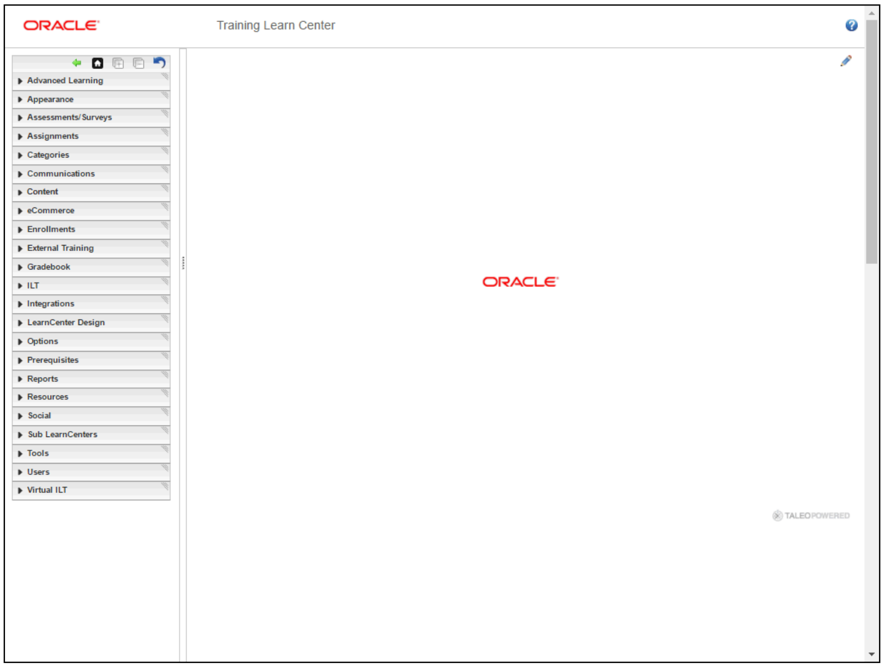
Section 2 - Lesson 2, Exercise 9 - **Creating Surveys**

You can add Surveys for Users to complete after they have participated in an learning event. These Surveys can be time-delayed or sent right away. Surveys can be sent to all Users or to a random sampling of Users. They can also be sent to the User's Supervisor to report on their employee's learning experience.

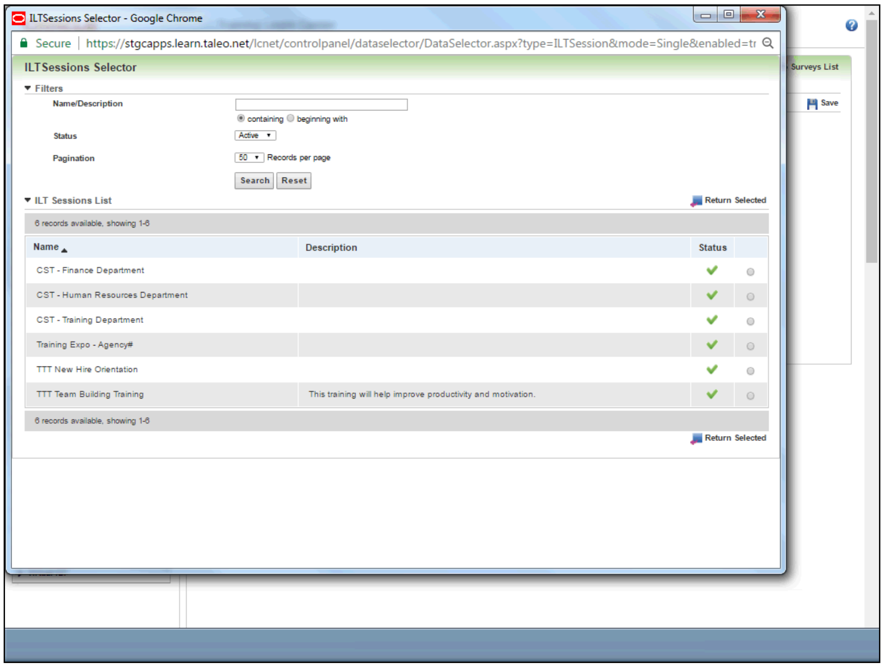
Procedure

In this lesson, you will learn how to create a Survey.

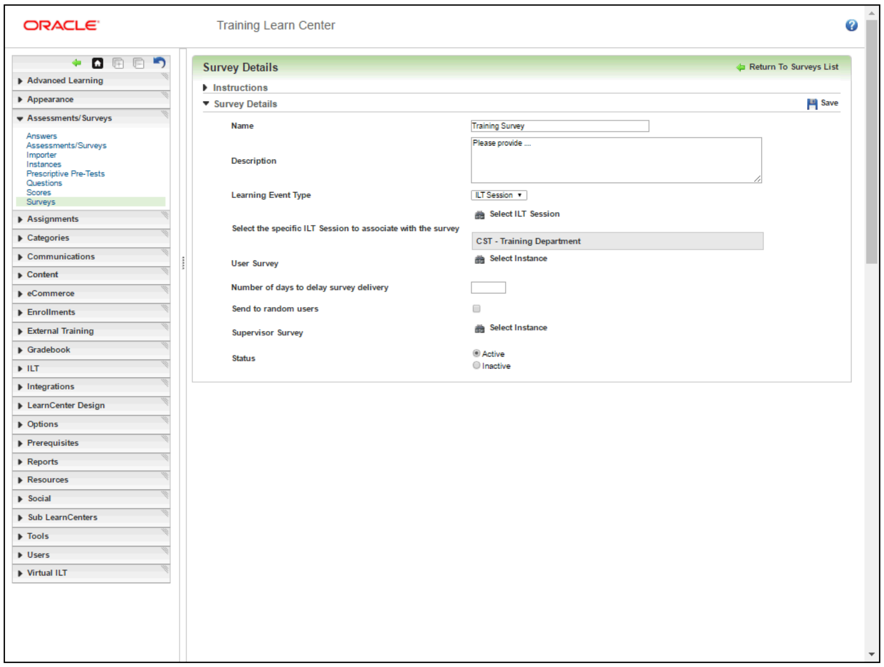
Survey name: Training Survey



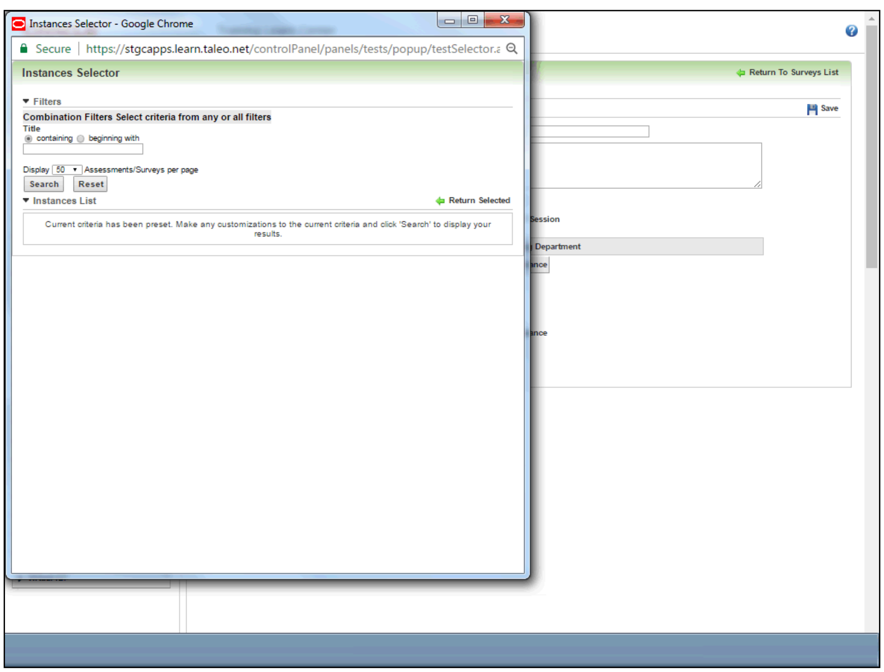
Step	Action
1.	Click the **Assessments/Surveys** link. Assessments/Surveys
2.	Click the **Surveys** link. Surveys
3.	Click the **Add Survey** button. Add Survey
4.	Enter the desired information into the field. Enter "**Training Survey**".
5.	Enter the desired information into the field. Enter "**Please provide ....**".
6.	Click the **Learning Event Type** list item. [Select]
7.	Click the **ILT Session** list item. ILT Session
8.	Click the **Select ILT Session** link. Select ILT Session



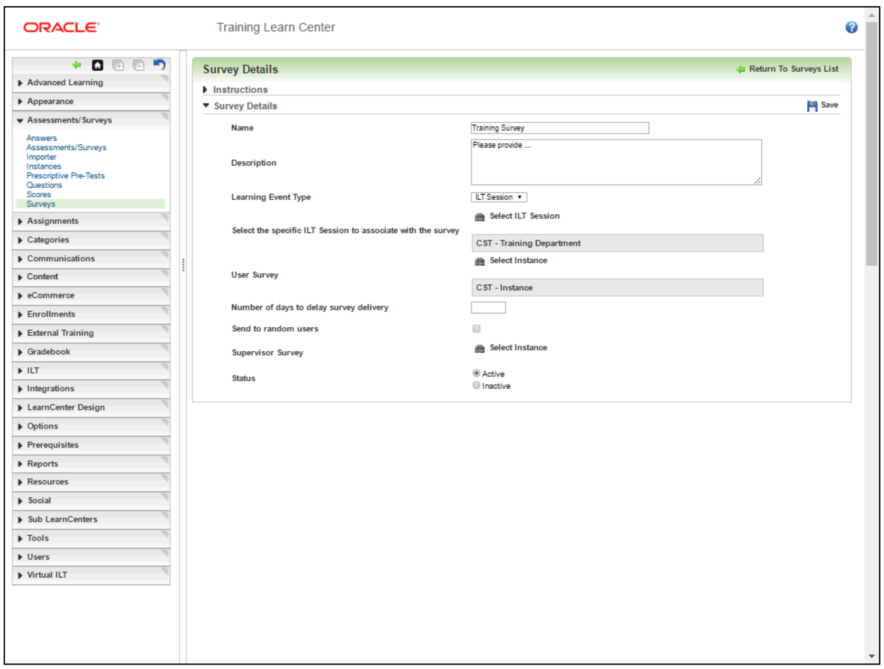
Step	Action
9.	Click the **CST - Training Department** option.
10.	Click the **Return Selected** link. 



Step	Action
11.	Click the **Select Instance** link. Select Instance



Step	Action
12.	Click the **Search** button. Search
13.	Click the **CST - Instance** option.
14.	Click the **Return Selected** link. Return Selected



Step	Action
15.	Enter the desired information into the **Number of days to delay survey delivery** field. Enter "**0**".
16.	Click the **Save** button. Save
17.	Click the **Collapse** button.
18.	Click the **Home** button.

Step	Action
19.	Congratulations! You have completed this lesson. **End of Procedure.**

S2L3 - Training Admins

Creating Instructor-Led Training

Section 2 - Lesson 3, Exercise 1 - **Creating Instructor-Led Training (ILT)**

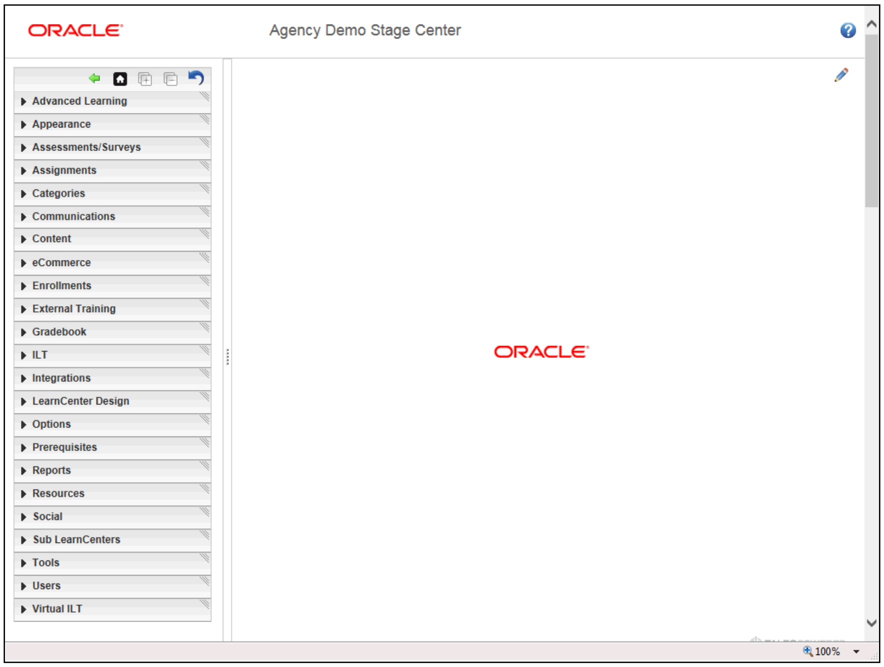
The Instructor Led Training (ILT) menu enables you to add and set up information for learning Events that take place in actual physical locations with live instructors. You can also use this menu to add a database of Assets (instructors, locations, equipment) that are used for ILT Events.

Procedure

In this lesson, you will learn how to create an ILT. It will include adding an instructor and location.

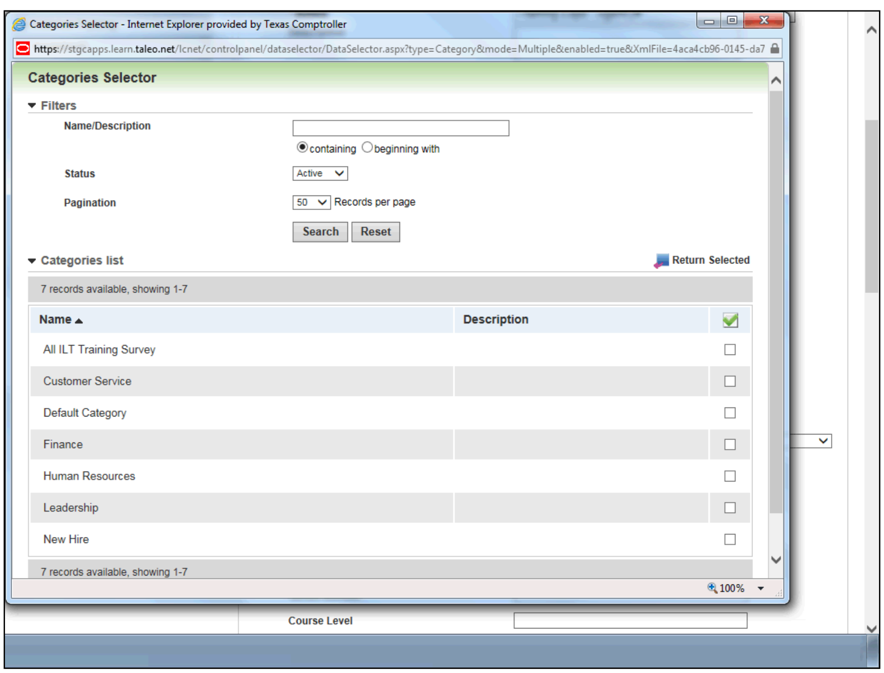
You will also display this ILT in the Showroom for users to Enroll.

The ILT name: Event Name - Training Expo
Track: Training Expo - All Employees
Session: Training Expo Agency#
Instructor: Poppy Seed
Location: Southcliff Facility

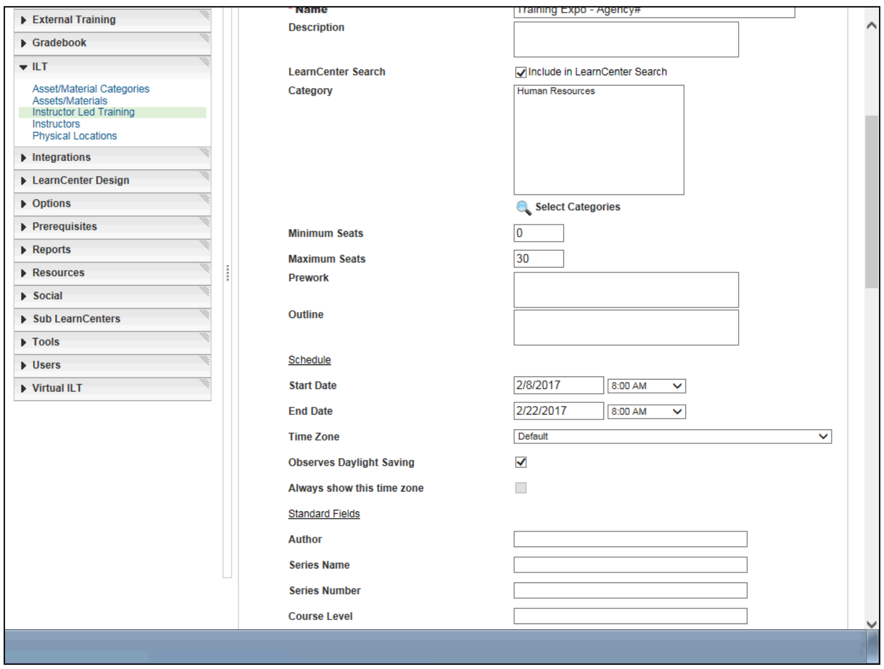


Step	Action
1.	Click the **ILT** link. ILT
2.	Click the **Instructor Led Training** link. Instructor Led Training
3.	Listed on this page are Events with their Track names, and Sessions. This gives you an idea of the framework that you will build. ILTs should have an Event, a Track and a Sessions tied to them. However there is an option to have stand-alone sessions.
4.	Click the **Add Event** link. Add Event
5.	Enter the desired information into the **Name** field. Enter "**Training Expo**". *
6.	Click the **Save** button.
7.	Click the **Add Track** link. Add Track

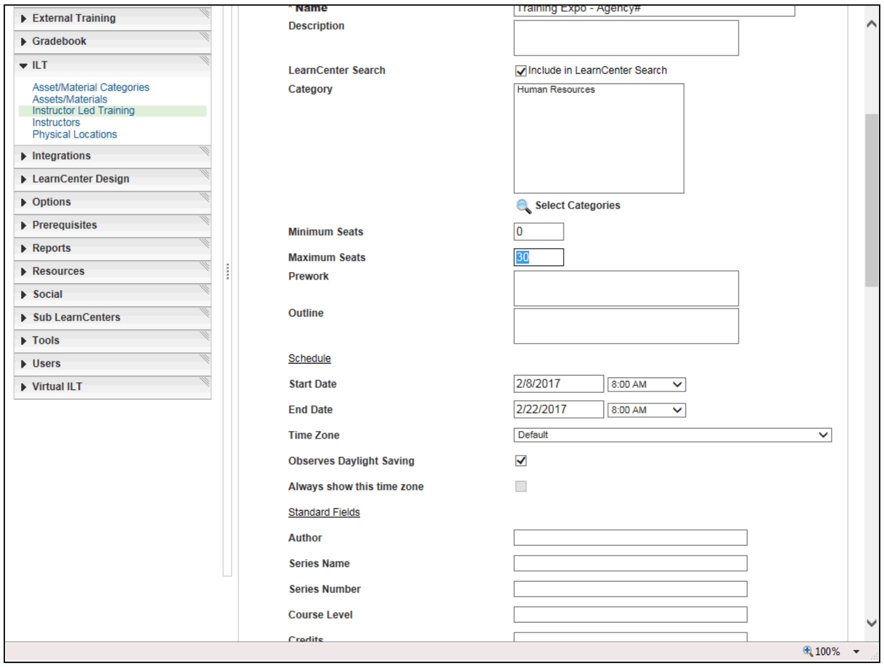
Step	Action
8.	Enter the desired information into the * field. Enter " **- All Employees**". * Training Expo
9.	Click the **Save** link. Save
10.	Click the **Add Session** link. Add Session
11.	Enter the desired information into the **Name** field. Enter " **- Agency#**". **Name** Training Expo
12.	Click the scrollbar.
13.	You may select from the list of existing Categories. If there are no categories created you will need to create one and then select it from here. Click the **Select Categories** link. Select Categories



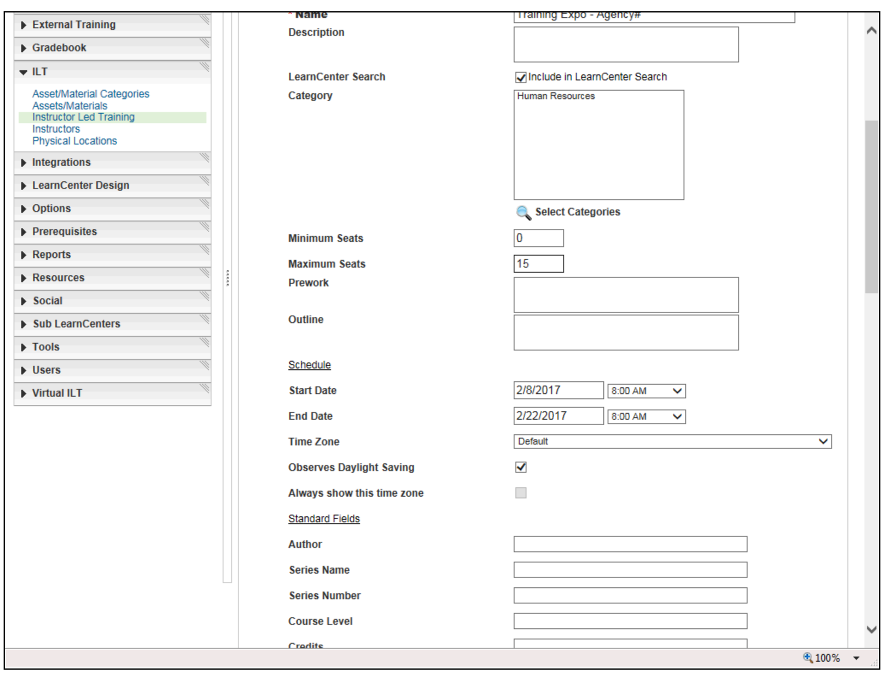
Step	Action
14.	Click the **Human Resources** option. Human Resources
15.	Click the **Return Selected** link. Return Selected



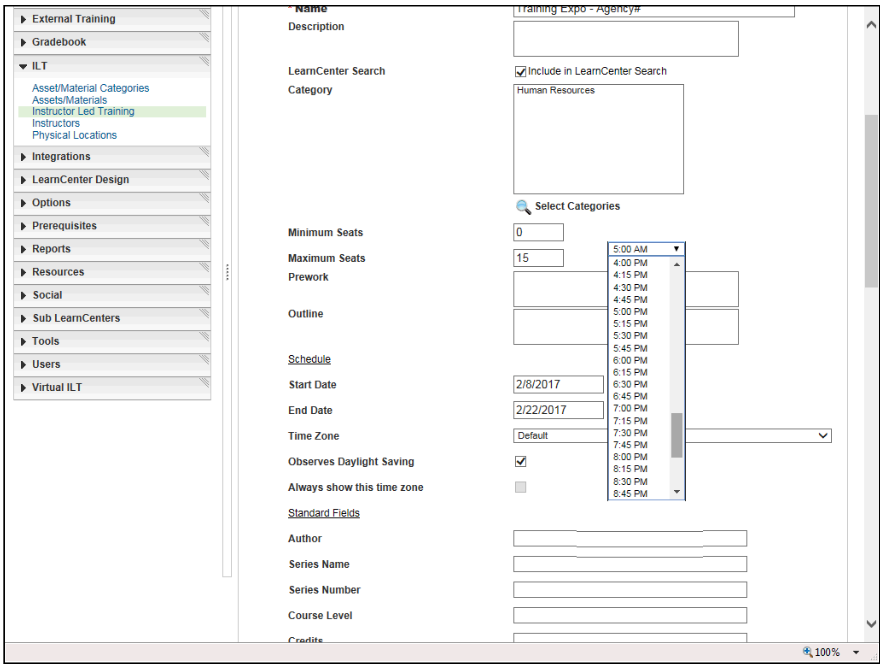
Step	Action
16.	The maximum number of seats are 15. Click in the field. 30



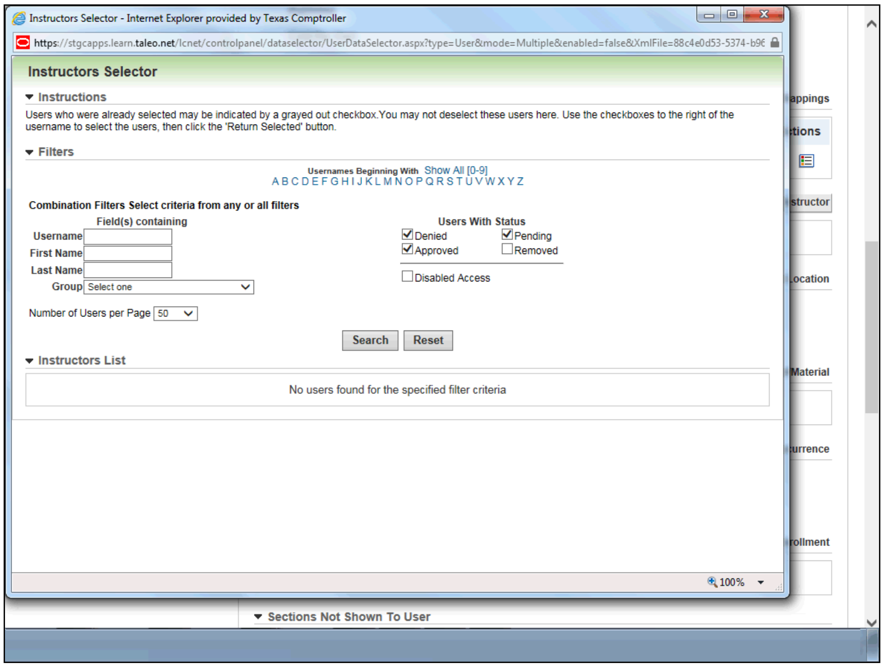
Step	Action
17.	Enter the desired information into the **Maximum Seats** field. Enter "**15**". 

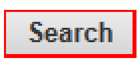
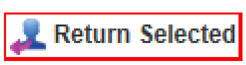


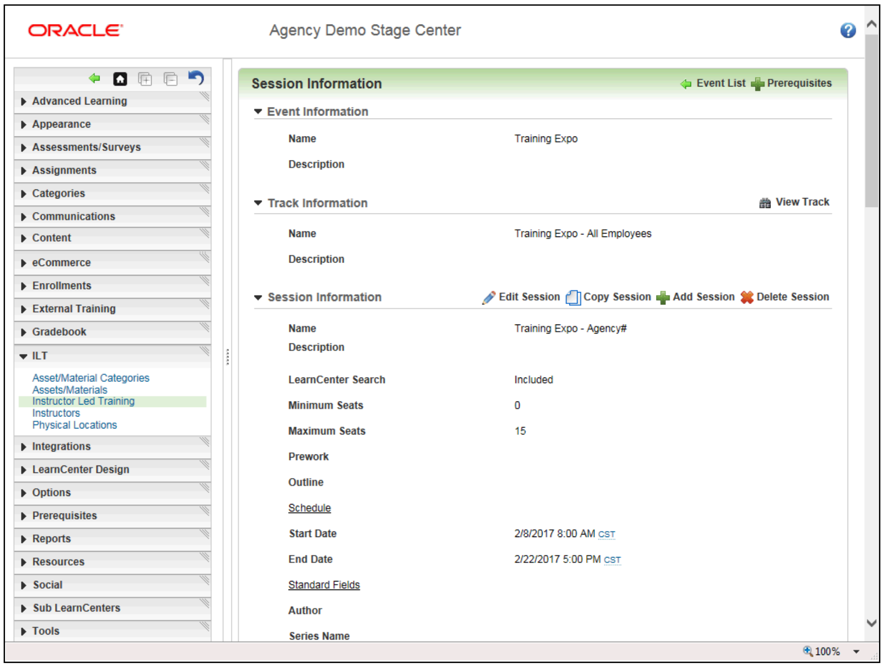
Step	Action
18.	Click the button to the right of the **Time** field.



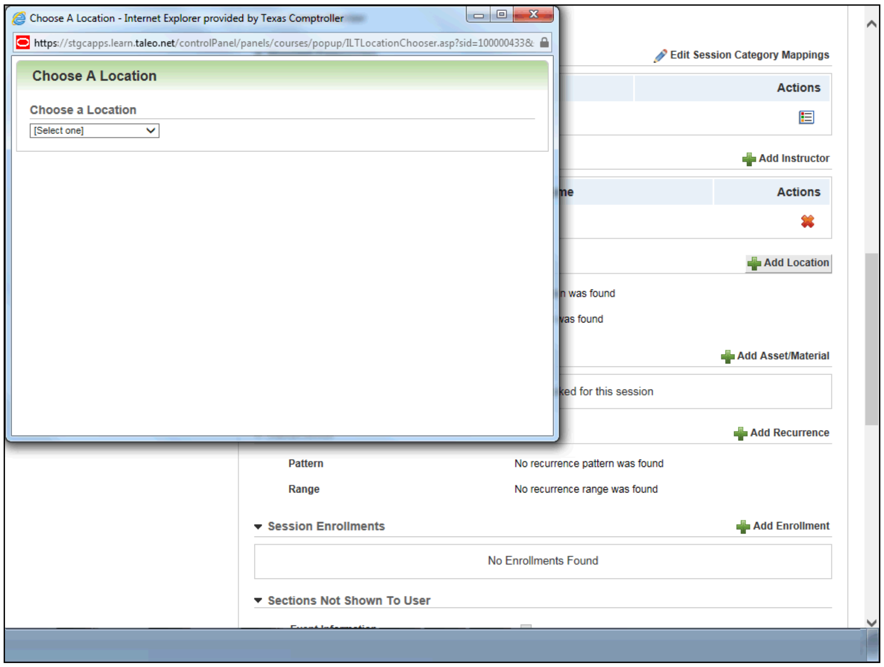
Step	Action
19.	Change the End Time to 5:00 PM. Click the **5:00 PM** list item. 5:00 PM
20.	Click the scrollbar.
21.	Click the **Save** link. Save
22.	Click the scrollbar.
23.	Click the **Add Instructor** link. Add Instructor



Step	Action
24.	Click the **Search** button. 
25.	Click the **Actions** option.
26.	Click the **Return Selected** link. 

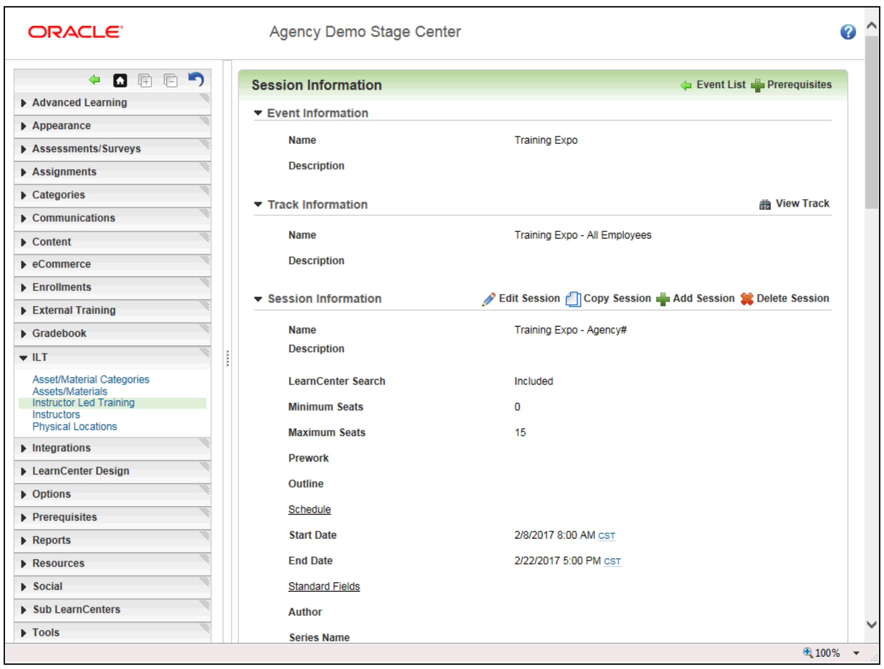


Step	Action
27.	Click the scrollbar.
28.	Locations should have already been added to the Locations Table. Adding will pull the selected Location from that table. Click the **Add Location** button. 

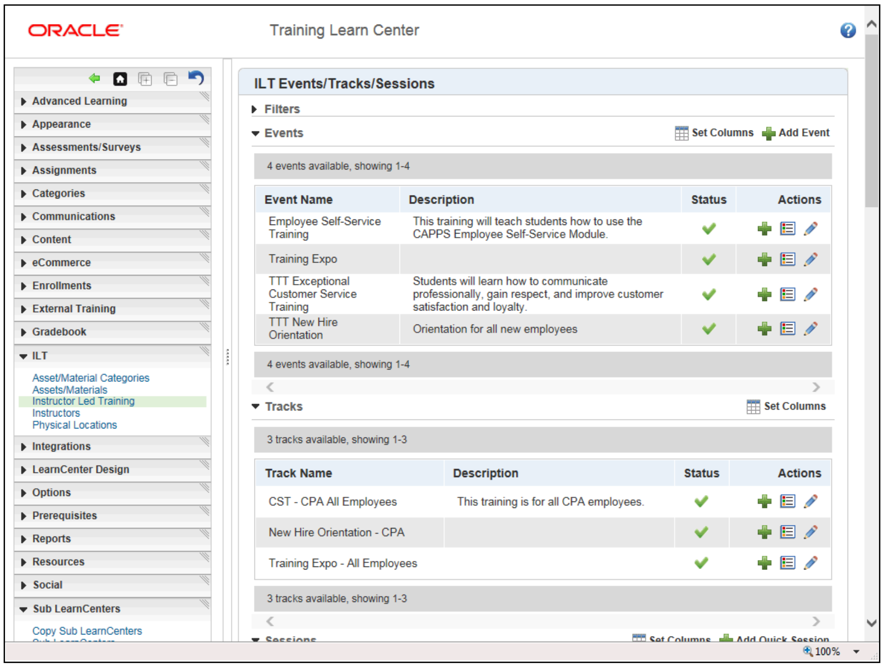


Step	Action
29.	Click the **Choose a Location** list. Choose a Location [Select one]
30.	Click the **Southcliff Training Facility** list item. Southcliff Training Facility
31.	You can select a Room for the session but it does not reserve the room at Southcliff. You must make scheduling arrangements at Southcliff outside of the system. Click the **Choose a Room** list. Choose a Room [Select one]
32.	Click the **Training Room 2016** list item. Training Room 2016
33.	Click the **February** list item. February
34.	Click the **8** date/time field. 8

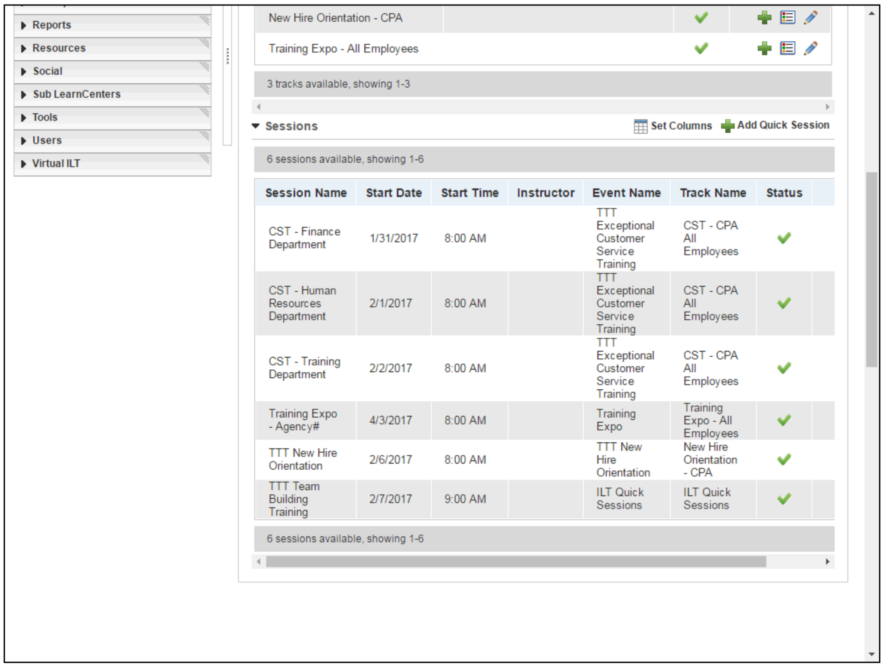
Step	Action
35.	Click the scrollbar.
36.	Click the **Save** button. 

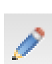


Step	Action
37.	Click the scrollbar.
38.	Click the scrollbar.
39.	Click the scrollbar.
40.	Click the **Event List** link. 
41.	The Training Expo Event is listed along with the Track and Session.

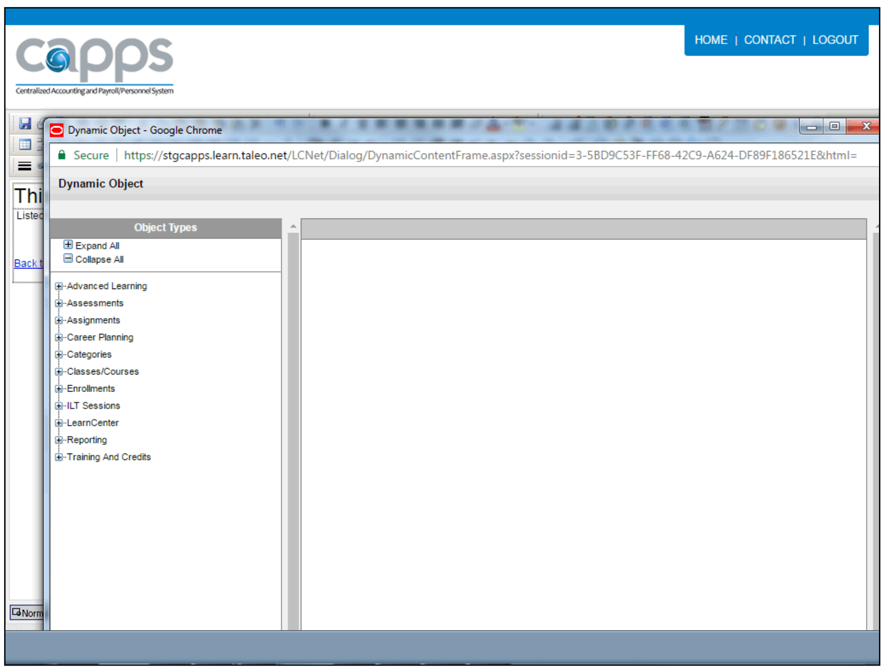


Step	Action
42.	To view the Session, Click the scrollbar.
43.	Click the scrollbar.

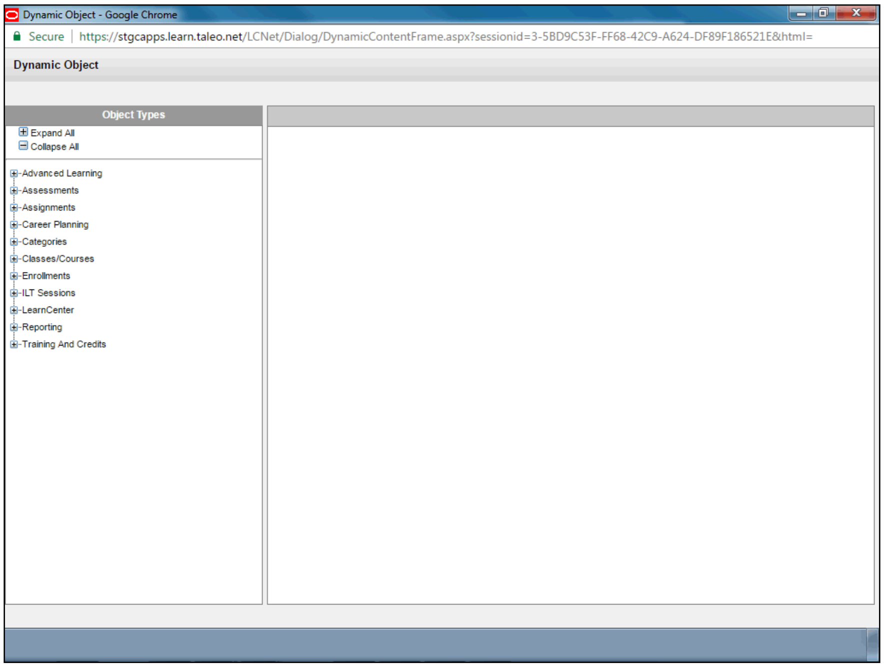


Step	Action
44.	Click the scrollbar.
45.	The following steps will show you how to place the session in the Showroom so Users can enroll.
46.	Click the **Back Arrow** link. 
47.	Click the **Course Catalog** link. Course Catalog
48.	Click the **INSTRUCTOR LED TRAINING** link. INSTRUCTOR LED TRAINING
49.	This is where you will see the ILT class after you place it in the Showroom.
50.	Click the **Edit** link. 
51.	Click the **Edit** button. 

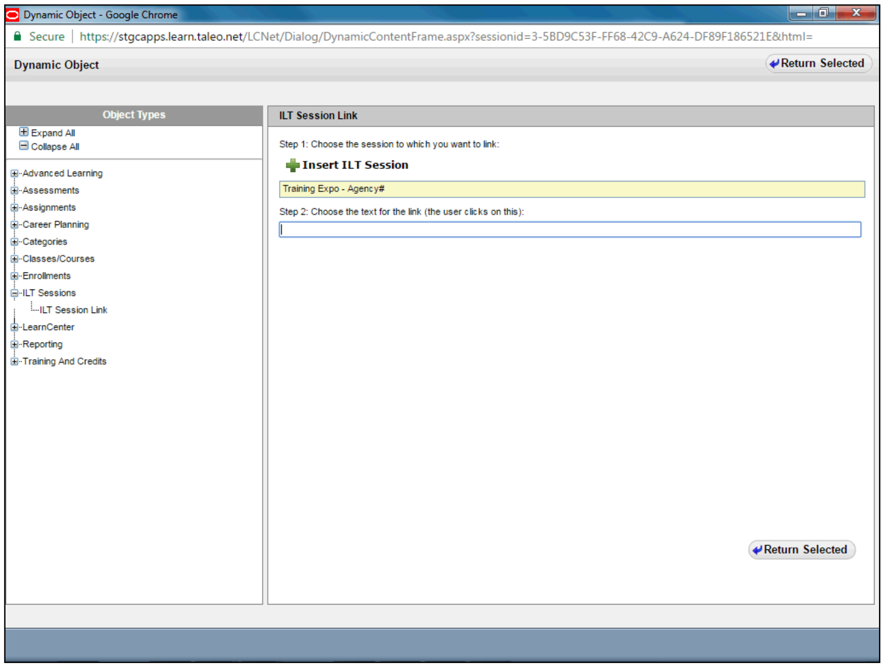
Step	Action
52.	You will click in the area where you want the text to appear. Click in the **WSYWYG text** field.
53.	Click the **Dynamic Object (DO)** link. 



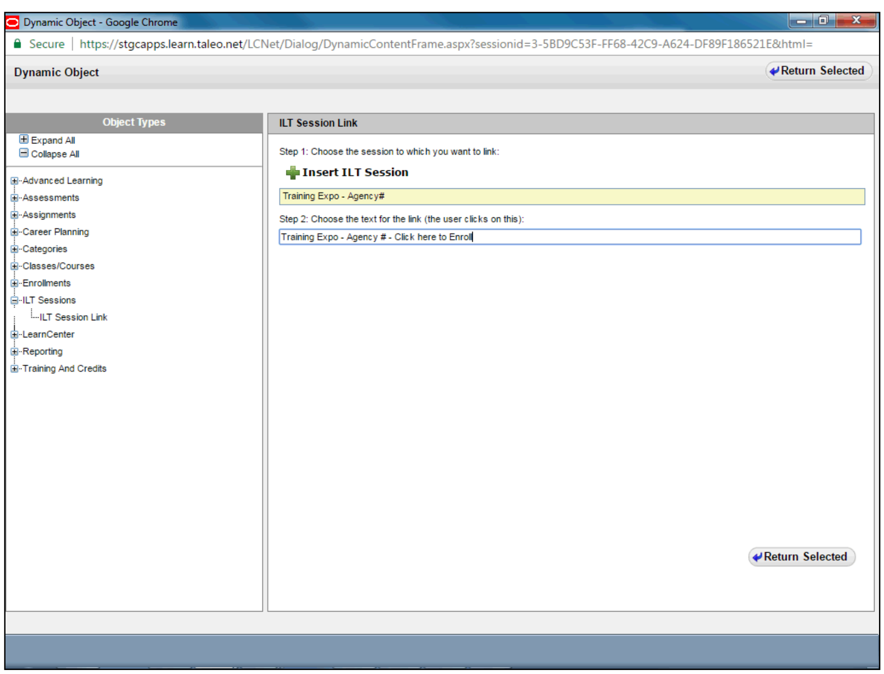
Step	Action
54.	Click the **Maximize** button. 

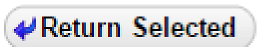


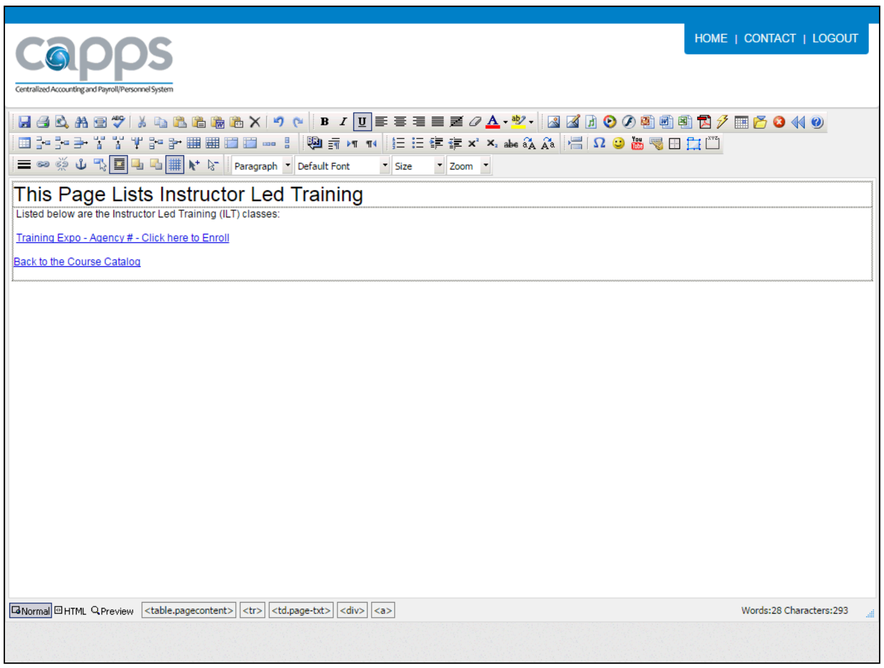
Step	Action
55.	Click the **ILT Sessions** link. ILT Sessions
56.	Click the **ILT Session** link. ILT Session Link
57.	Click the **Insert ILT Session** link. Insert ILT Session
58.	Click the **Training Expo - Agency#** option.
59.	Click the **Return Selected** link. Return Selected
60.	You will type the text as you want it to appear on the ILT Training Listing. Click the whitespace. Click Here
61.	Press **[Delete]**.



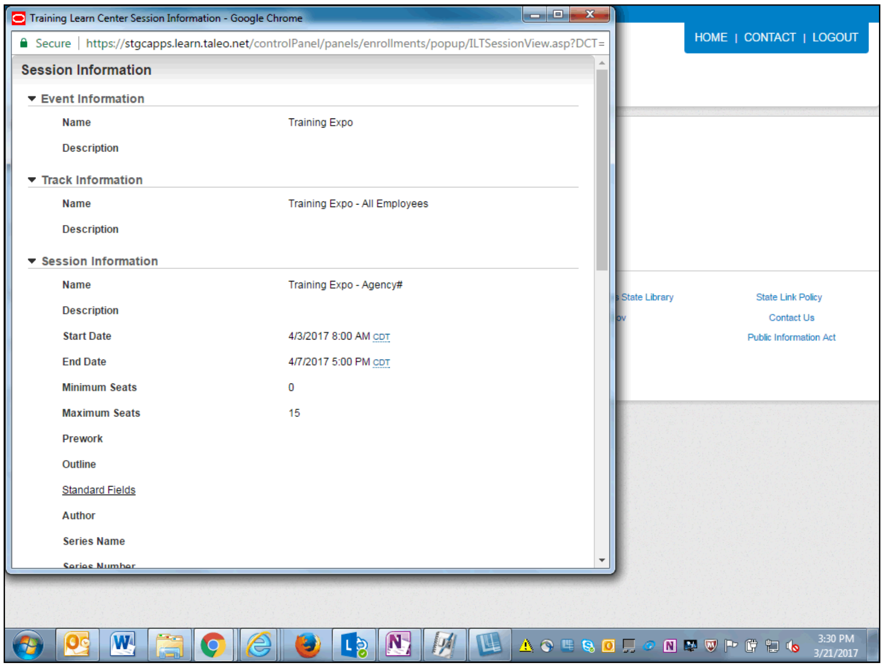
Step	Action
62.	Enter the desired information into the field. Enter "**Training Expo - Agency # - Click here to Enroll**".



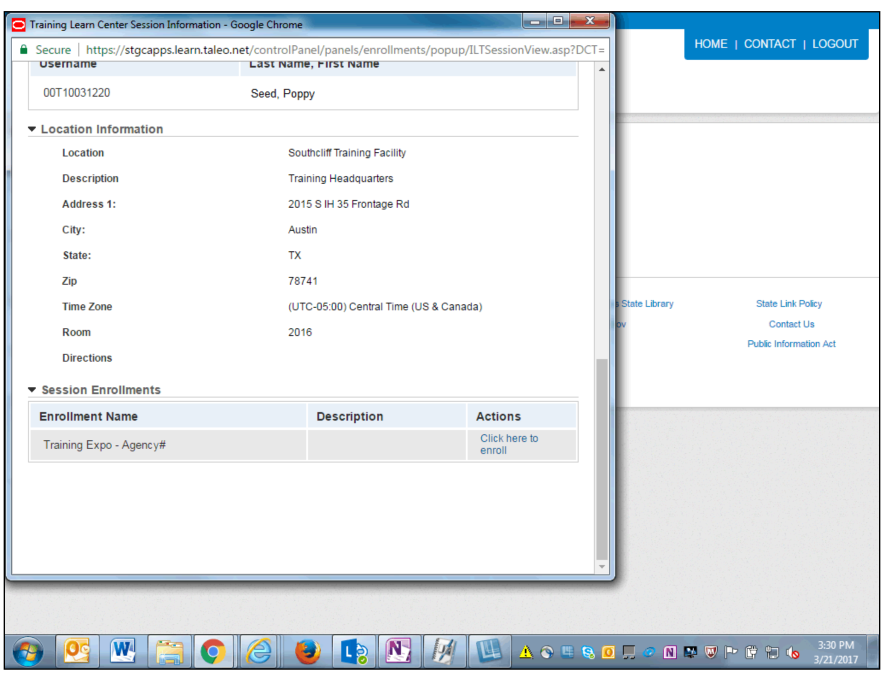
Step	Action
63.	Click the **Return Selected** button. 
64.	Your text is showing within the text field.

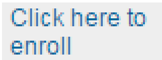


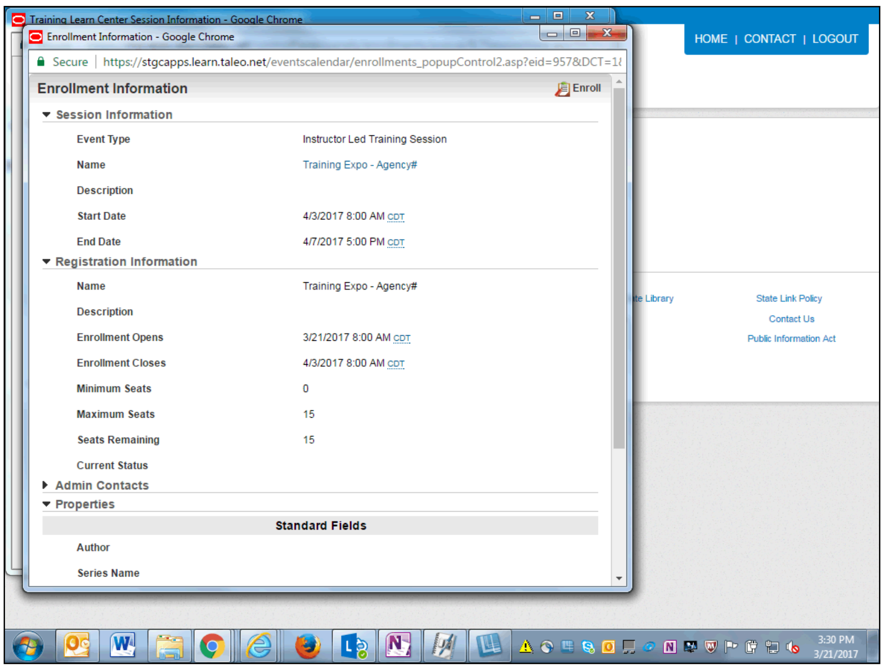
Step	Action
65.	Click the **Save** button. 
66.	Click the **View** link. 
67.	This how Users will see the listing of ILT classes.
68.	You can test the link from here. Click the **Training Expo - Agency # - Click here to Enroll Link** link. 



Step	Action
69.	The Session Information appears. Click the scrollbar.



Step	Action
70.	Click the **Click here to enroll** link.  Click here to enroll
71.	The **User** will use the **Enroll** button at the top right of the page.



Step	Action
72.	Click the **Close** button. 
73.	Click the **Close** button. 
74.	Congratulations! You have completed this lesson. **End of Procedure.**

Creating Assessments (Tests)

Section 2 - Lesson 3, Exercise 2 - **Creating Assessments (Tests)**

There are many tasks to perform when creating an Assessment. The following is a basic high level overview of this process:

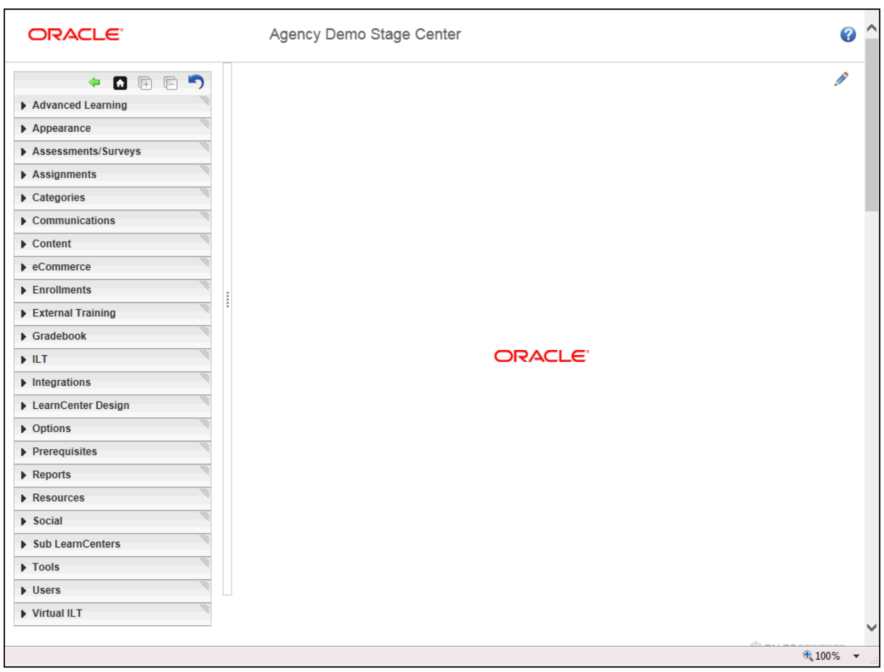
1. Add Categories - This will assist you in organizing your test-related items for easy retrieval and when randomizing Questions for a particular Assessment.
2. Add Questions and Answers for the Assessments.
3. Add the Assessment and package the Questions and Answers together.
4. Add the Instance by defining the properties of the Assessment, such as the passing grade.
5. Distribute the Assessment to users - This is accomplished by creating an Enrollment or Assignment.
6. Manage Scores - Convert numeric scores into non-numeric scores if necessary.

Procedure

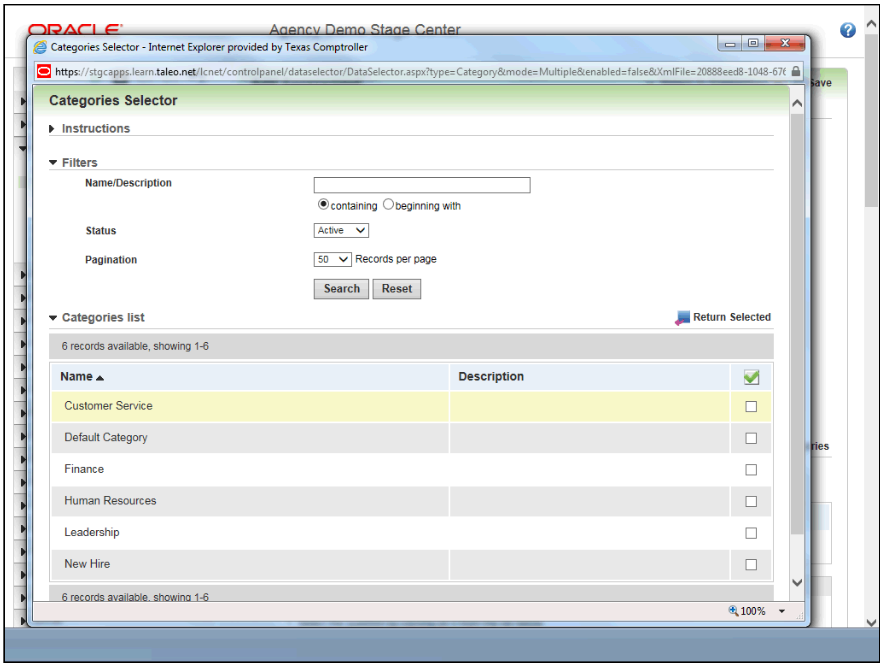
In this lesson, you will learn how to create an Assessment.

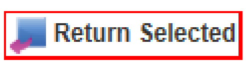
In this scenario, you will:

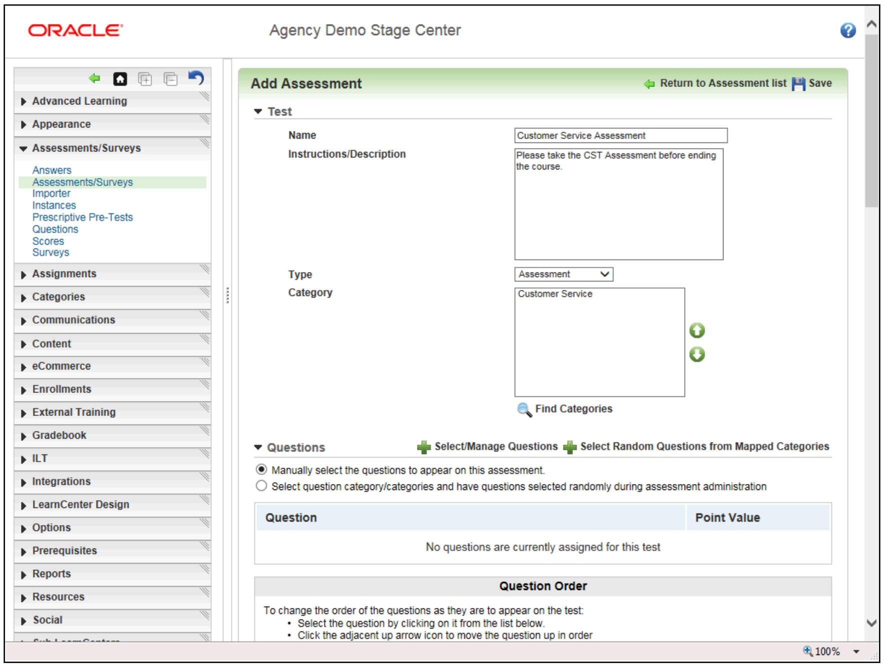
1) Create a Customer Service Assessment.
2) Map it to the Agency Demo Course
3) Add the CST - Instance



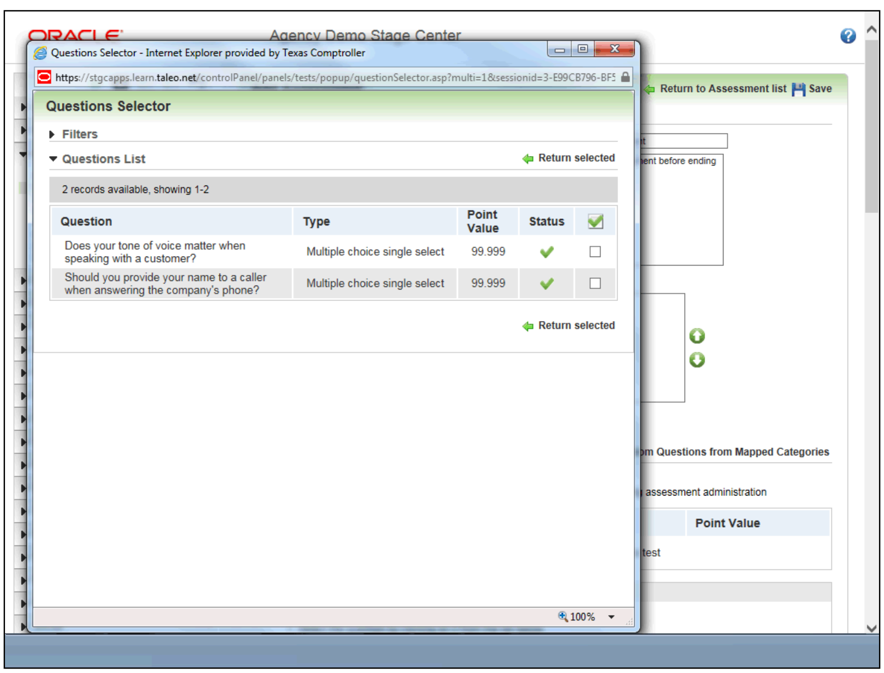
Step	Action
1.	Click the **Assessments/Surveys** link. Assessments/Surveys
2.	Click the **Assessments/Surveys** link. Assessments/Surveys
3.	Click the **Add Assessment** link. Add Assessment
4.	Enter the desired information into the **Name** field. Enter "**Customer Service Assessment**". Name
5.	Enter the desired information into the **Instructions/Description** field. Enter "**Please take the CST Assessment before ending the course.**". Instructions/Description
6.	Click the **Type** list. Type [Select one]
7.	Click the **Assessment** list item. Assessment
8.	Click the **Find Categories** link. Find Categories

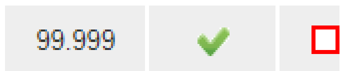
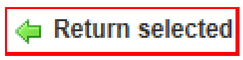


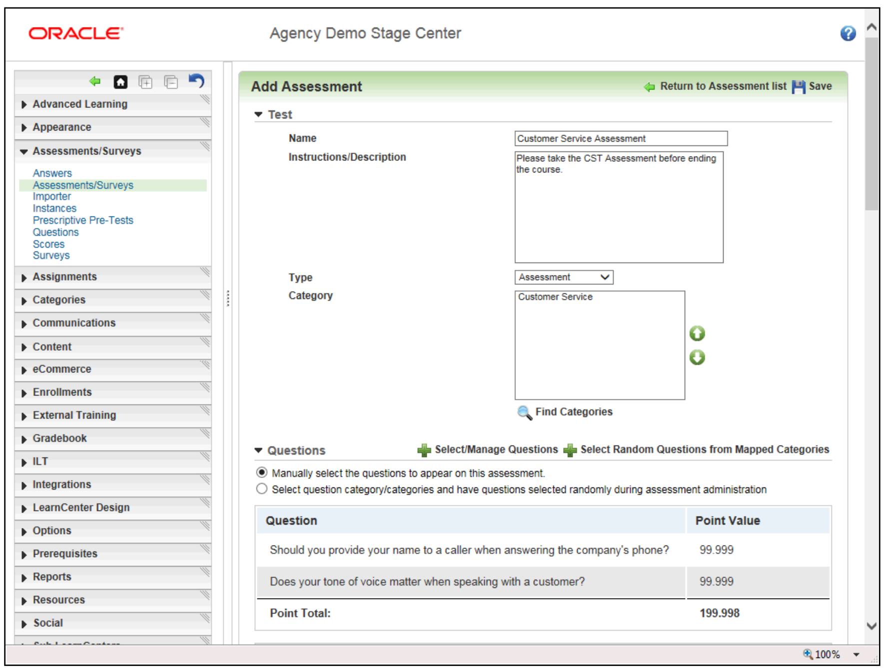
Step	Action
9.	Click the **Customer Service** option. 
10.	Click the **Return Selected** link. 



Step	Action
11.	Click the **Select/Manage Questions** link. Select/Manage Questions

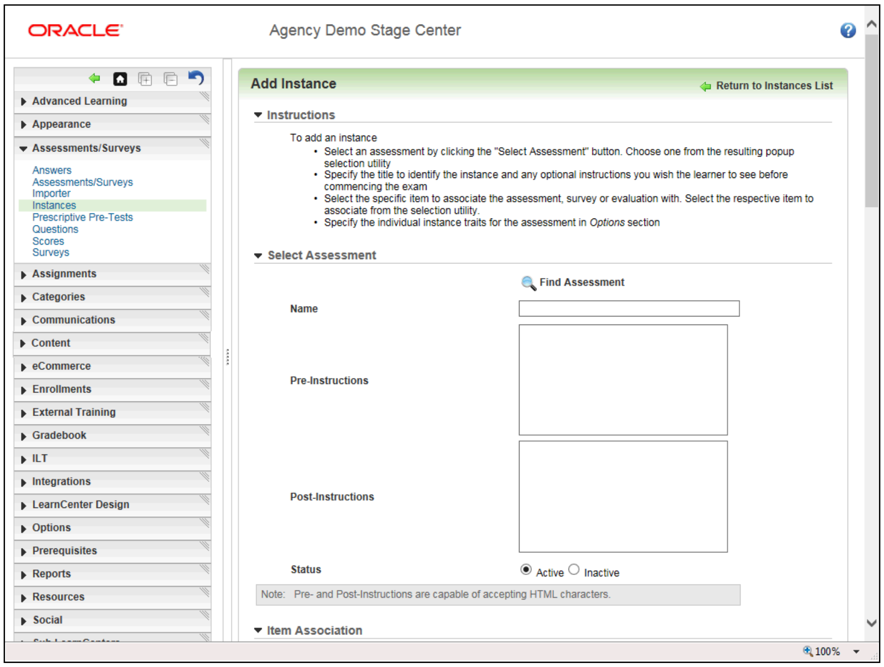


Step	Action
12.	Click the **99.999** option. 
13.	Click the **99.999** option. 
14.	Click the **Return selected** link. 

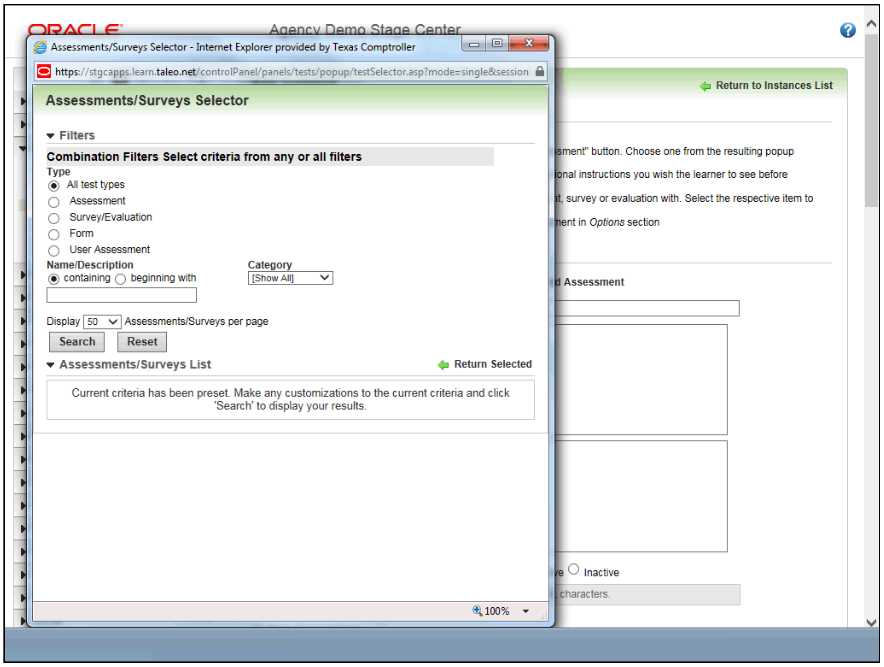


Step	Action
15.	Click the scrollbar.
16.	Click the **Save** link. 
17.	Click the **Instances** link. 

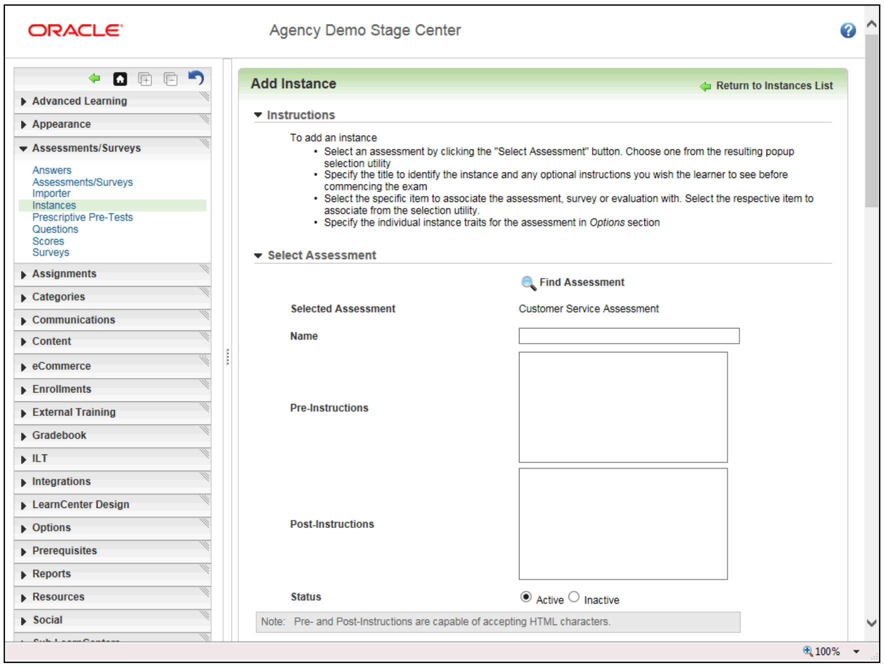
Step	Action
18.	Click the **Add Instance** link. Add Instance



Step	Action
19.	Click the **Find Assessment** button. Find Assessment

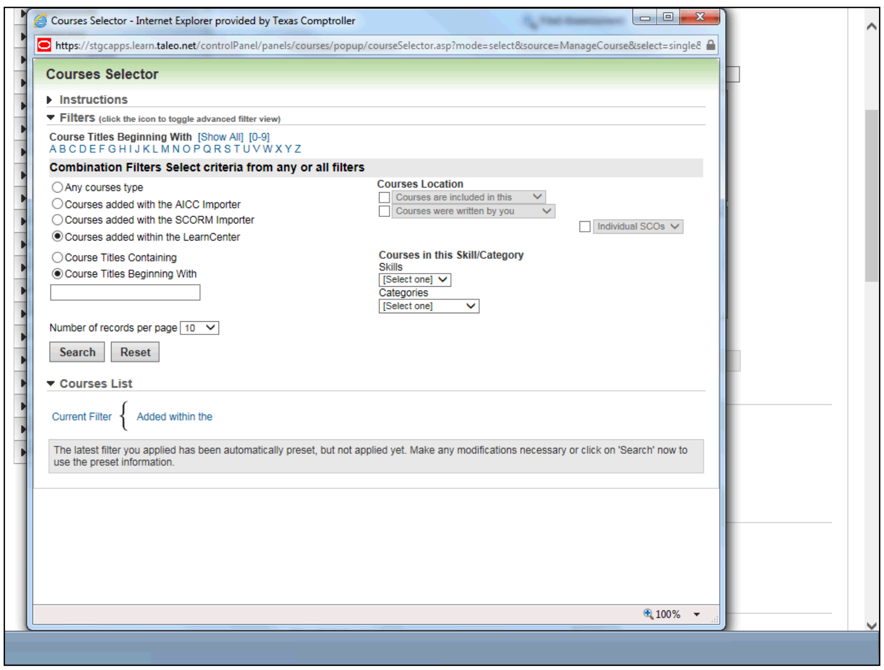


Step	Action
20.	Click the **Assessment** option. Type All test types Assessment Survey/Evaluation Form User Assessment
21.	Click the **Search** button. Search
22.	Click the **Customer Service Assessment** option. Customer Service Assessment
23.	Click the **Return Selected** link. Return Selected

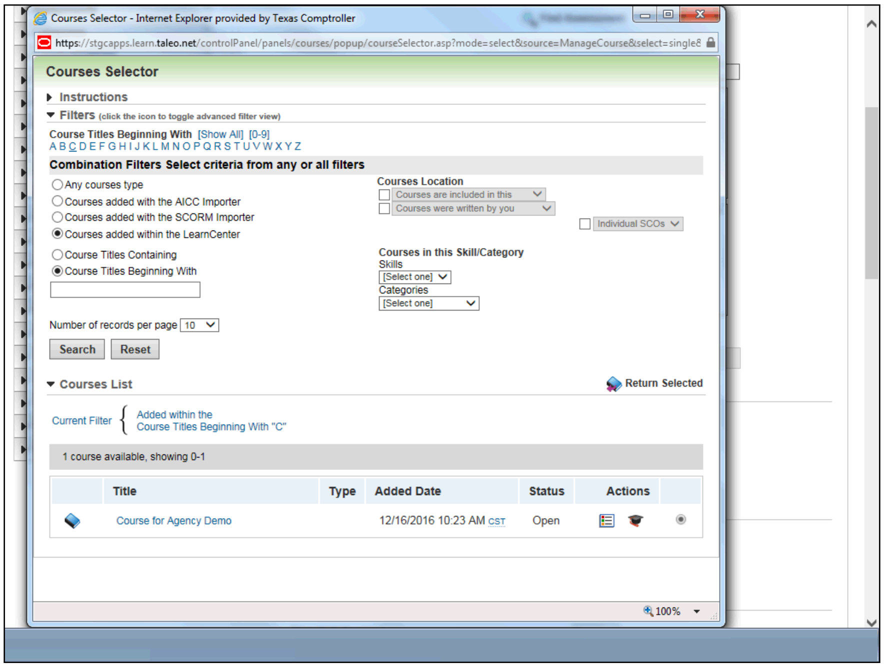


Step	Action
24.	Enter the desired information into the **Name** field. Enter "**CST Assessment**". Name
25.	Enter the desired information into the **Pre-Instructions** field. Enter "**Please take assessment prior to the end of the course.**". Pre-Instructions
26.	Enter the desired information into the **Post-Instructions** field. Enter "**In order for the course to be complete, you must take the assessment.**". Post-Instructions
27.	Click the scrollbar.

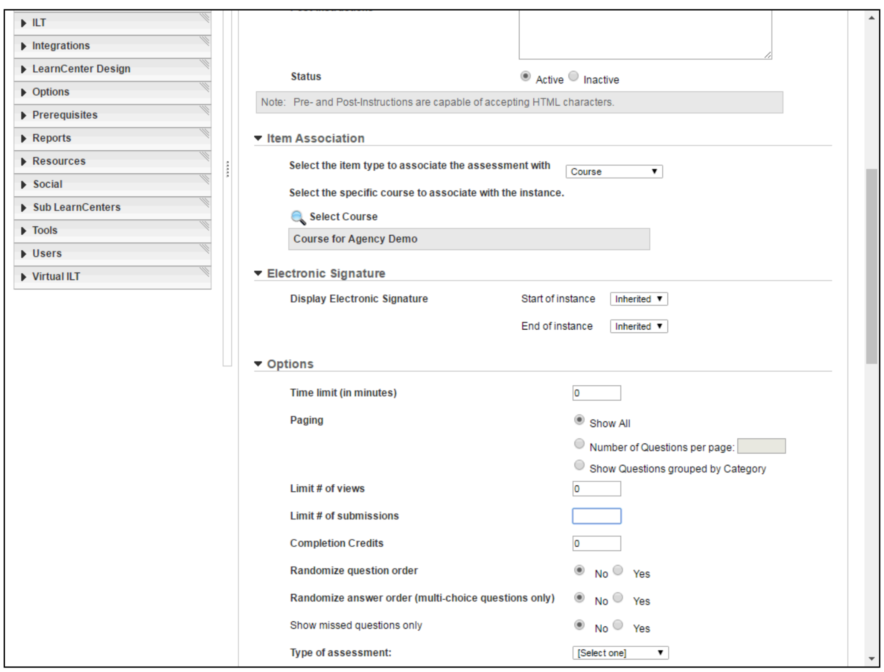
Step	Action
28.	Click the **Select the item type to associate the assessment with** list. Select the item type to associate the assessment with [Select one]
29.	Click the **Course** list item. Course
30.	Click the **Select Course** link. Select Course



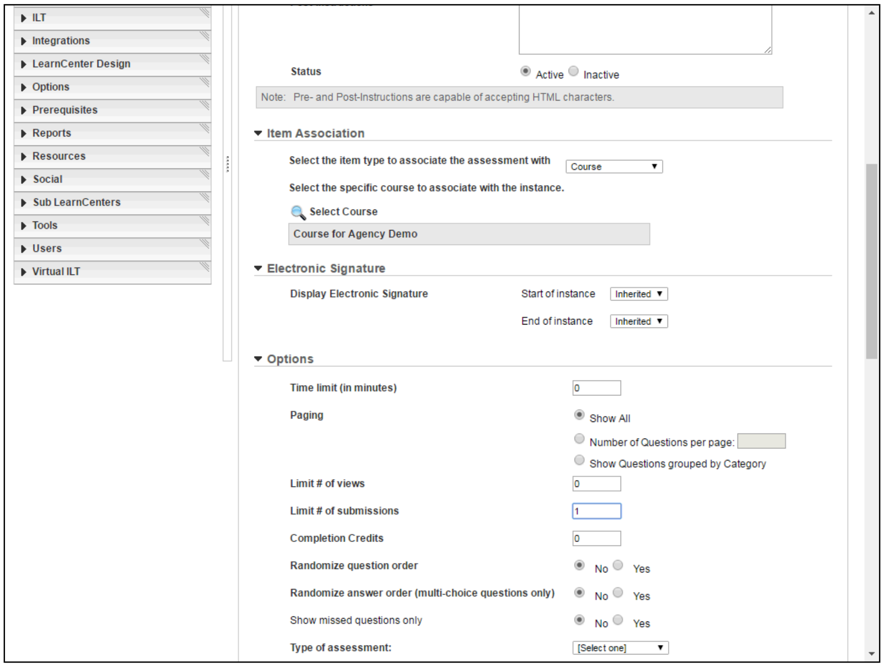
Step	Action
31.	Click the **Search** button. Search
32.	Click the **Selection** option. Course for Agency Demo 12/16/2016 10:23 AM CST Open



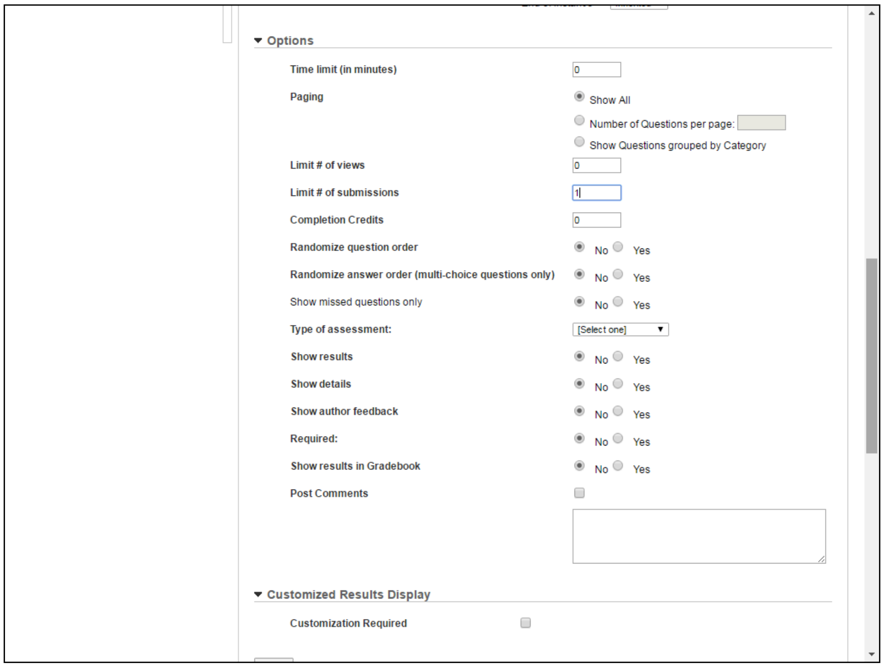
Step	Action
33.	Click the **Return Selected** link. Return Selected

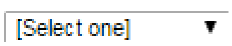


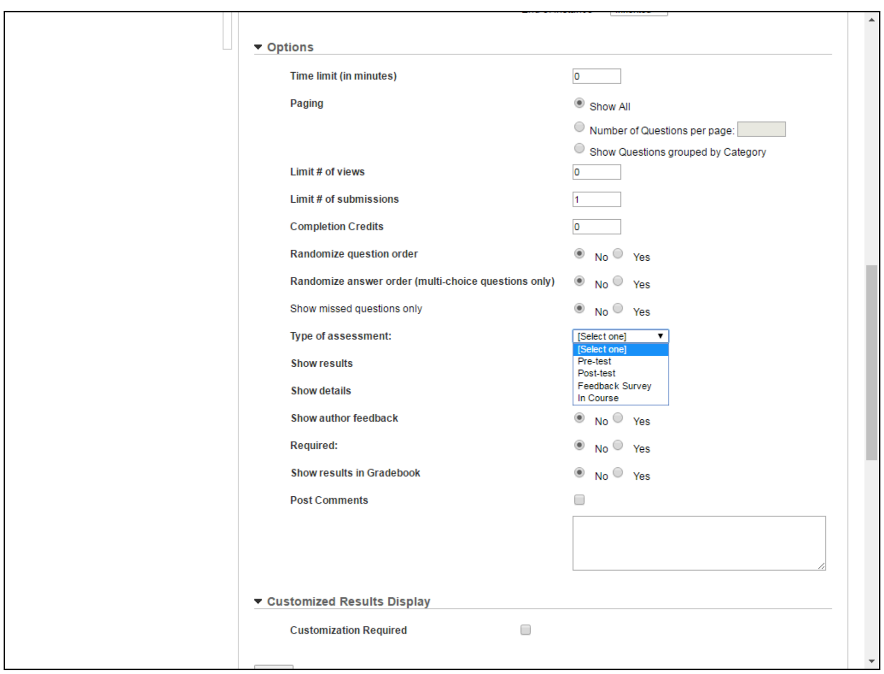
Step	Action
34.	Enter the desired information into the **Limit # of submissions** field. Enter "**1**".



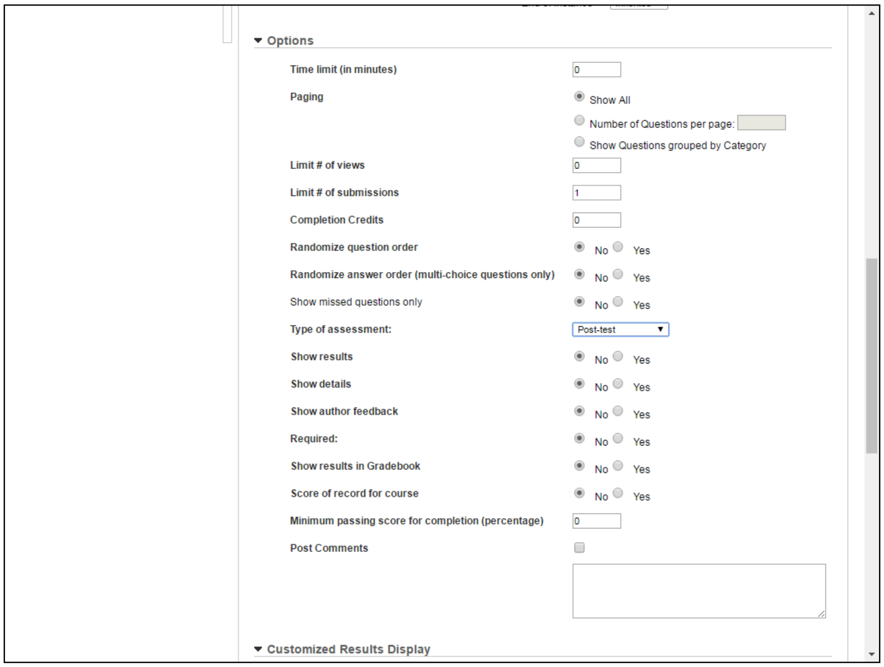
Step	Action
35.	Click the scrollbar.



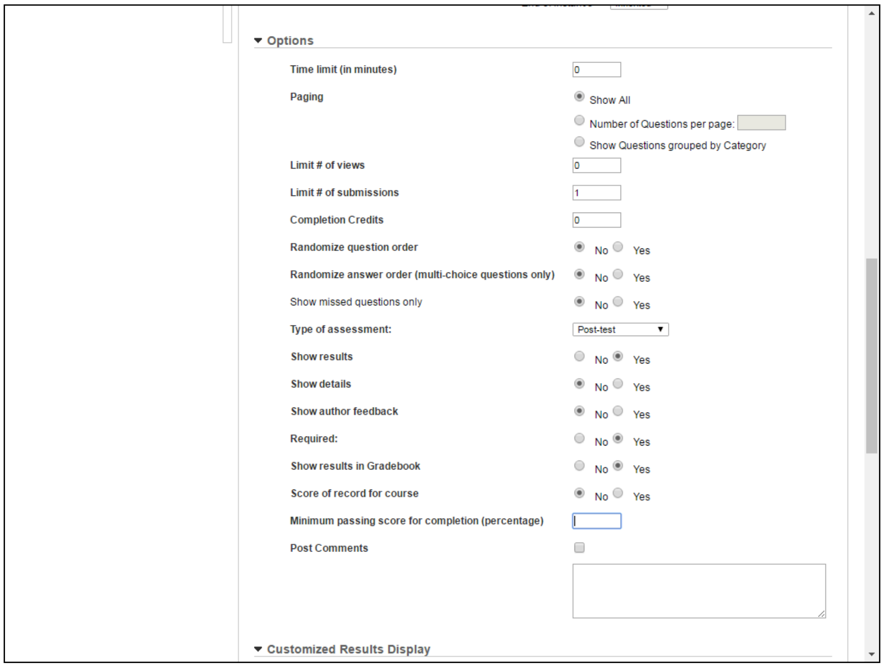
Step	Action
36.	Click the **Type of Assessment** button. 



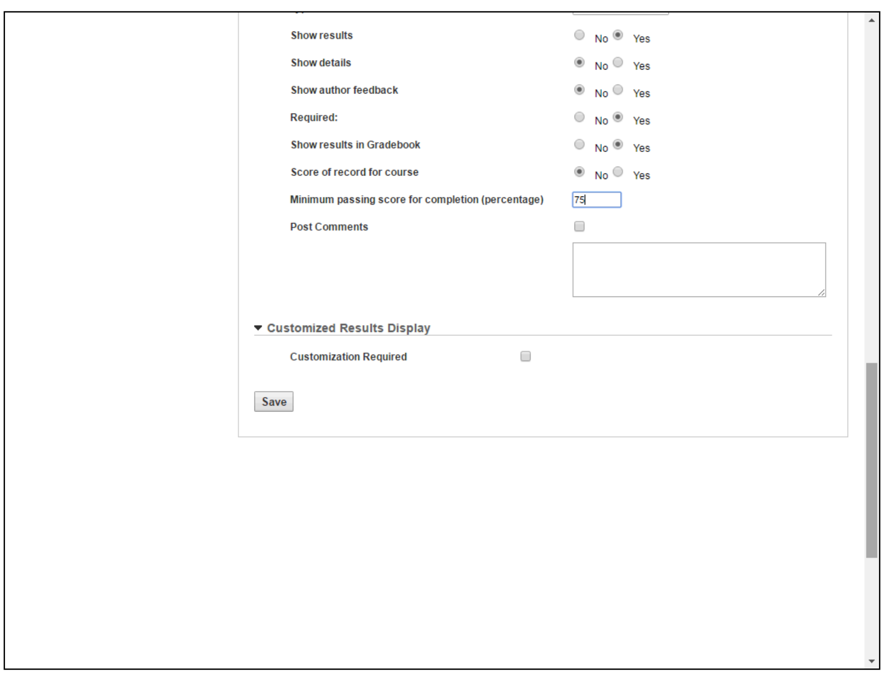
Step	Action
37.	Click the **Post-test** list item. Post-test



Step	Action
38.	Click the **Show results - Yes** option.
39.	Click the **Required - Yes** option.
40.	Click the **Yes** option.



Step	Action
41.	Enter the desired information into the **Minimum passing score for completion (percentage)** field. Enter "**75**".
42.	Click the scrollbar.



Step	Action
43.	Click the **Save** button. Save
44.	The CST - Instance is now created.
45.	Click the **Collapse** button.
46.	Click the **Home** button.
47.	Congratulations! You have completed this lesson. **End of Procedure.**

Creating Enrollments

Section 2 - Lesson 3, Exercise 3 - **Creating Enrollments**

Enrollments enable administrators, supervisors, and managers to prescribe learning and monitor student progress. Using Enrollments, you can make optional or mandatory training available to students. You can also enable students to self-enroll or nominate themselves for content.

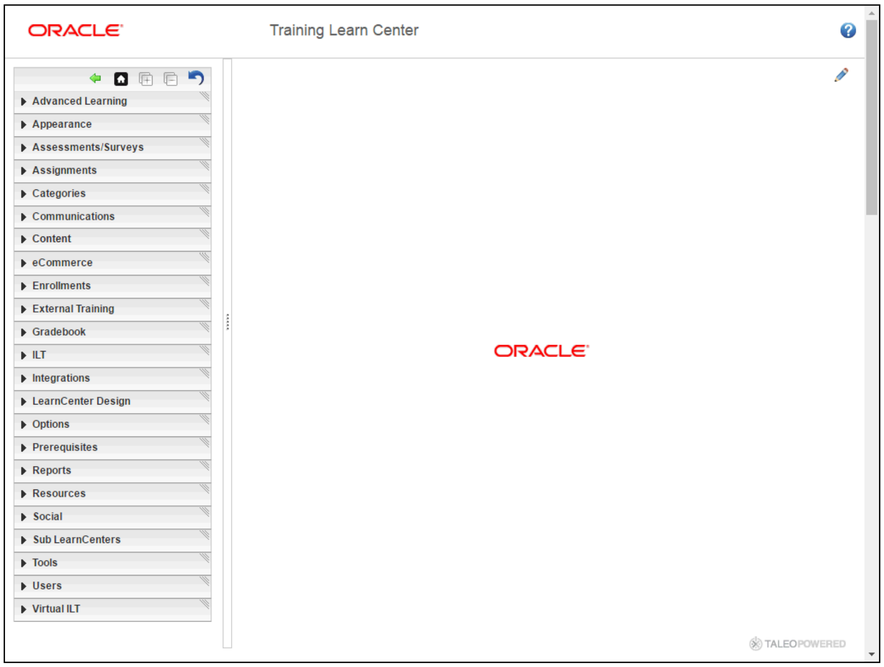
Self-enrollments can be set up to allow open enrollment or require supervisor approval. Users are notified of status changes through automatic email messages.

Procedure

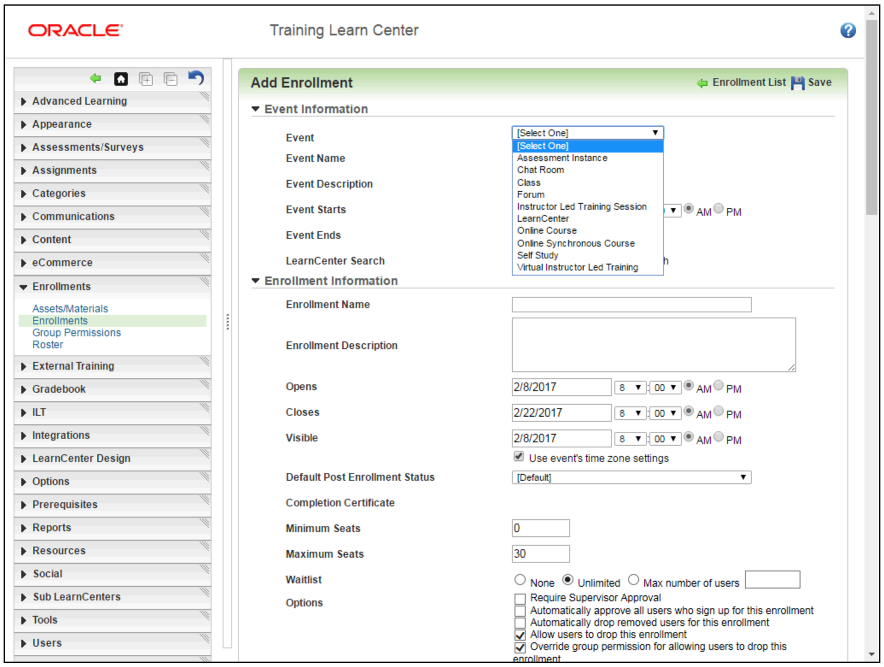
In this lesson, you will learn how to create Enrollments in order for Users to be able to enroll themselves in an ILT.

In addition, you will enroll a User into an ILT.

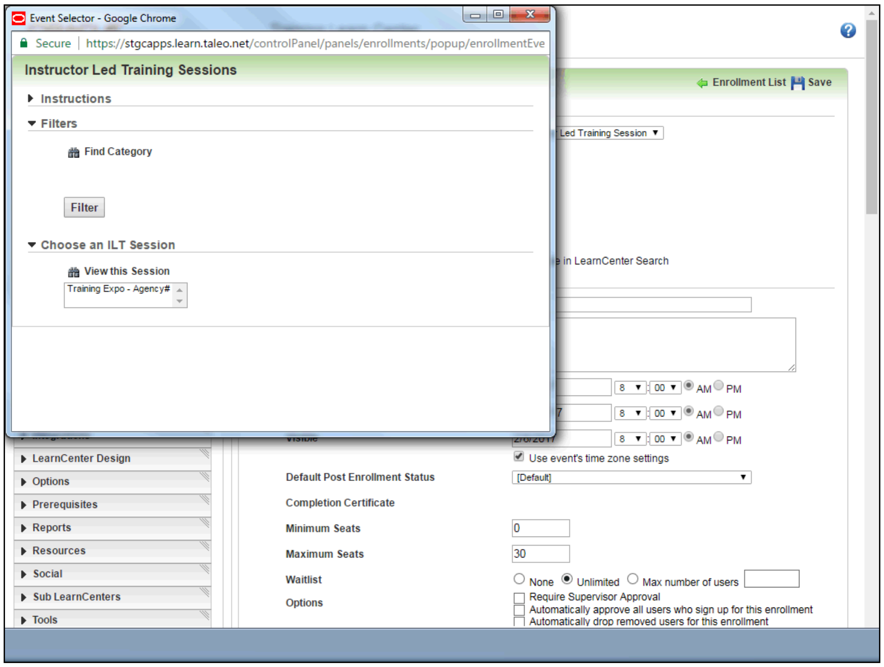
User: Minty Menthol
ILT Name: Training Expo Agency#
Category: Human Resources



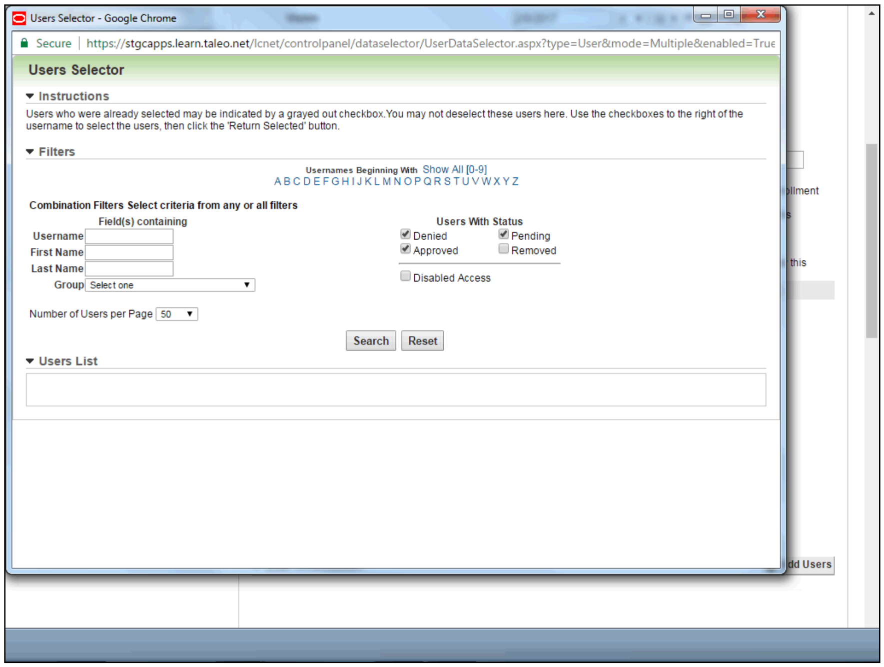
Step	Action
1.	Click the **Enrollments** link. Enrollments
2.	Click the **Enrollments** link. Enrollments
3.	Click the **Add Enrollment** link. Add Enrollment
4.	You will need to select the **Event** for the Enrollment. Click the button to the right of the **Event** field. ▼



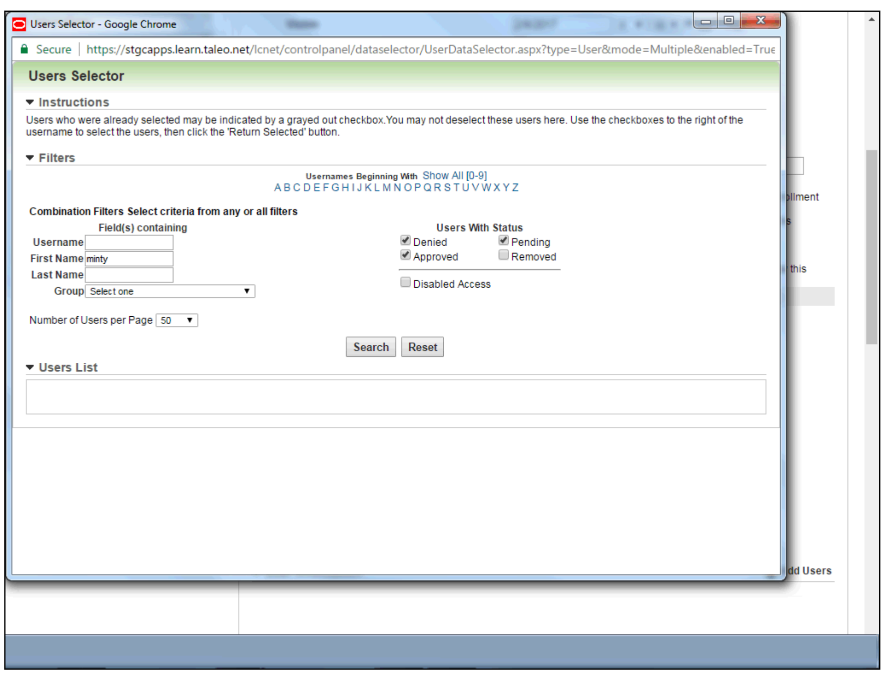
Step	Action
5.	Click the **Instructor Led Training Session** list item. 
6.	You can filter using a **Category** if one was created attached to the ILT. In this example, you will not filter by a Category, you will move forward an choose an ILT Session.



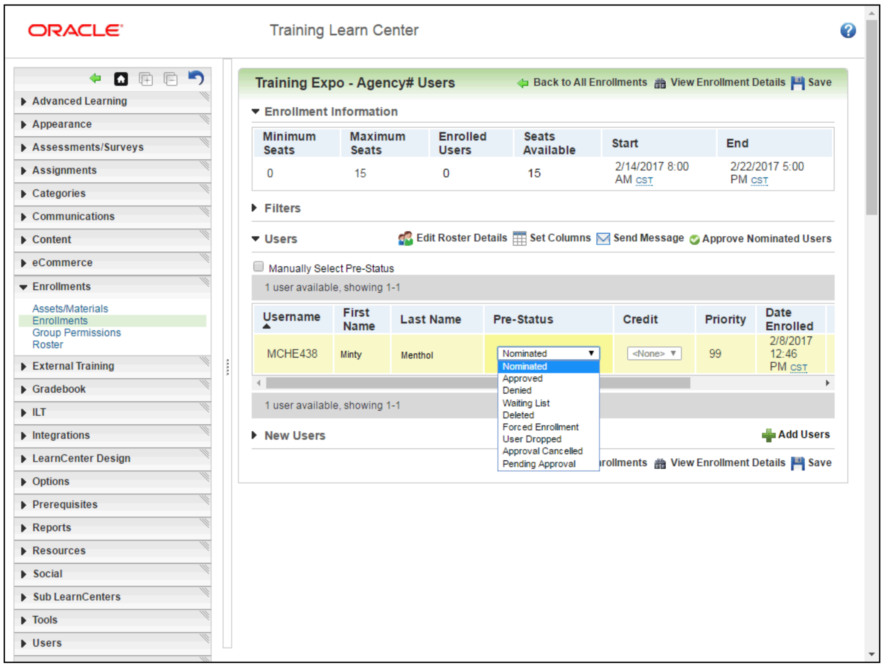
Step	Action
7.	Click the **Training Expo - Agency #** list item. Training Expo - Agency#
8.	Click the **Return Selected** link. Return Selected
9.	**IMPORTANT:** The **Enrollment Information** section contains options that can be edited for when this Session opens and closes for enrollment. You can also adjust when the session should be visible to Users, if applicable.
10.	Now you will walk through **Enrolling a User** for this session. Click the scrollbar.
11.	Be sure to review the **Options** section. If this enrollment requires a **Supervisor Approval**, it must be selected.
12.	Click the **Add Users** link. Add Users



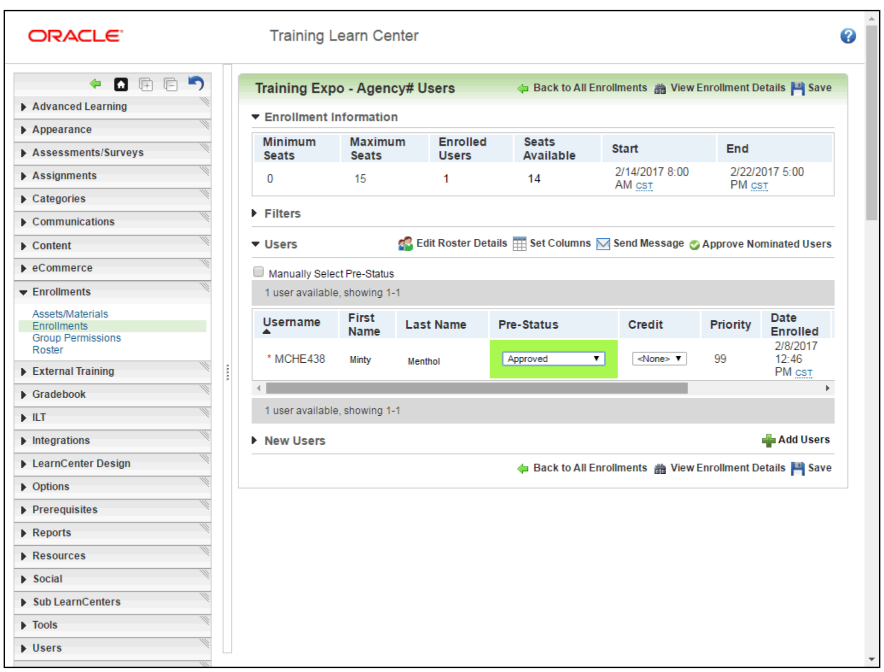
Step	Action
13.	Enter the desired information into the **First Name** field. Enter "**minty**".



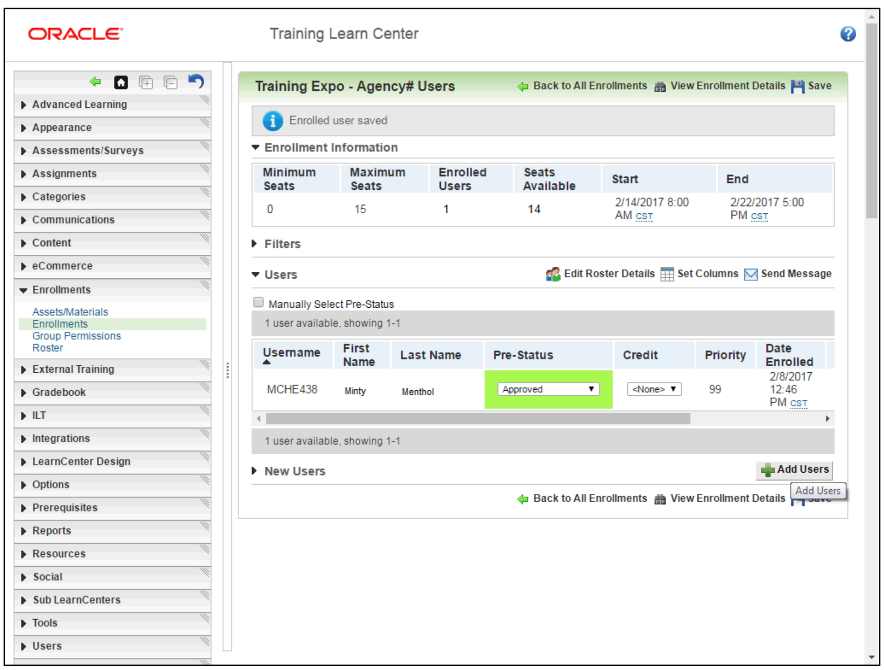
Step	Action
14.	Click the **Search** button. Search
15.	Minty appears in the **Users List** in an Approved Status. Now you will enroll them. Click the **Action** option.
16.	Click the **Return Selected** link. Return Selected
17.	Click the scrollbar.
18.	Click the scrollbar.
19.	Click the scrollbar.
20.	Click the **Save** button. Save
21.	Click the **Yes** button. Yes
22.	Click the scrollbar.
23.	Click the **View Users** link. View Users
24.	Minty has a **Pre-Status** of **Nominated**. This means there is an approval that needs to take place. For training purposes, change the status to Approved.
25.	Click the button to the right of the **Pre-Status** field.



Step	Action
26.	Click the **Approved** list item. Approved

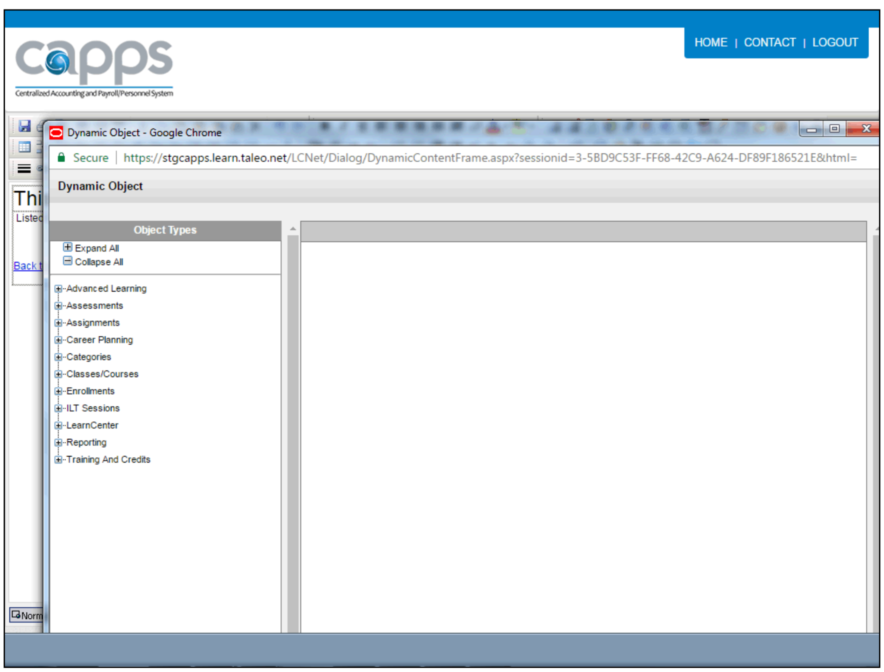


Step	Action
27.	Click the **Save** button. Save
28.	Click the **Back to All Enrollments** link. Back to All Enrollments
29.	The following steps will show you how to place the session in the Showroom so Users can Enroll.

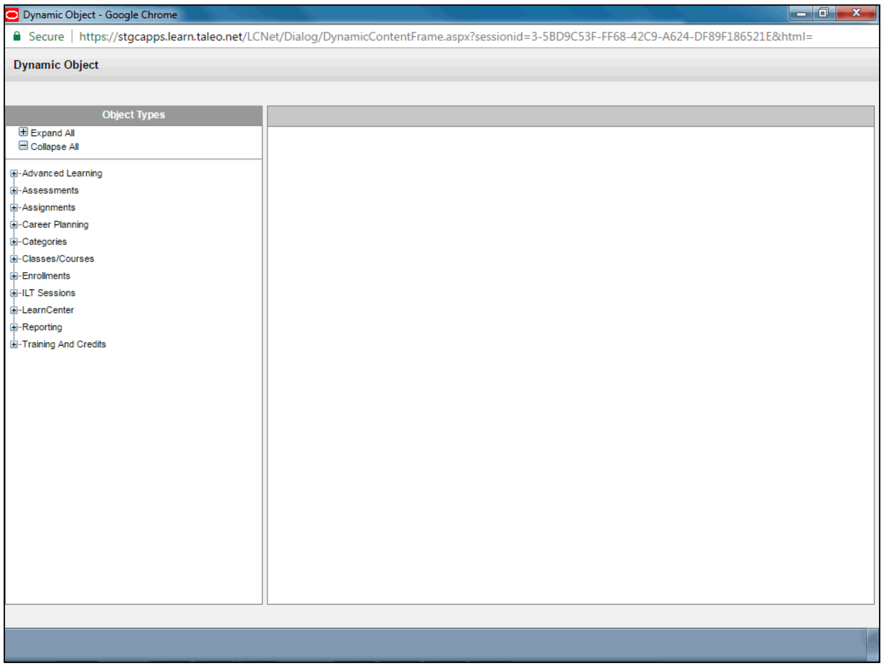


Step	Action
30.	Click the **Back Arrow** link.
31.	Click the **Course Catalog** link. Course Catalog
32.	Click the **INSTRUCTOR LED TRAINING** link. INSTRUCTOR LED TRAINING
33.	This is where you will see the ILT class after you place it in the Showroom.

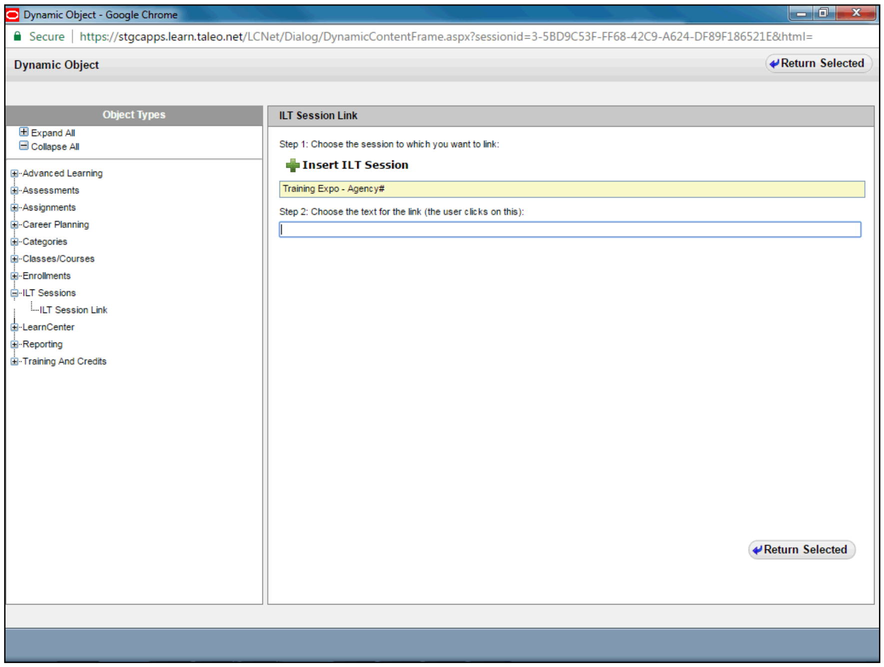
Step	Action
34.	Click the **Edit** link. 
35.	Click the **Edit** button. 
36.	You will click in the area where you want the text to appear. Click in the **WSYWYG text** field.
37.	Click the **Dynamic Object (DO)** link. 



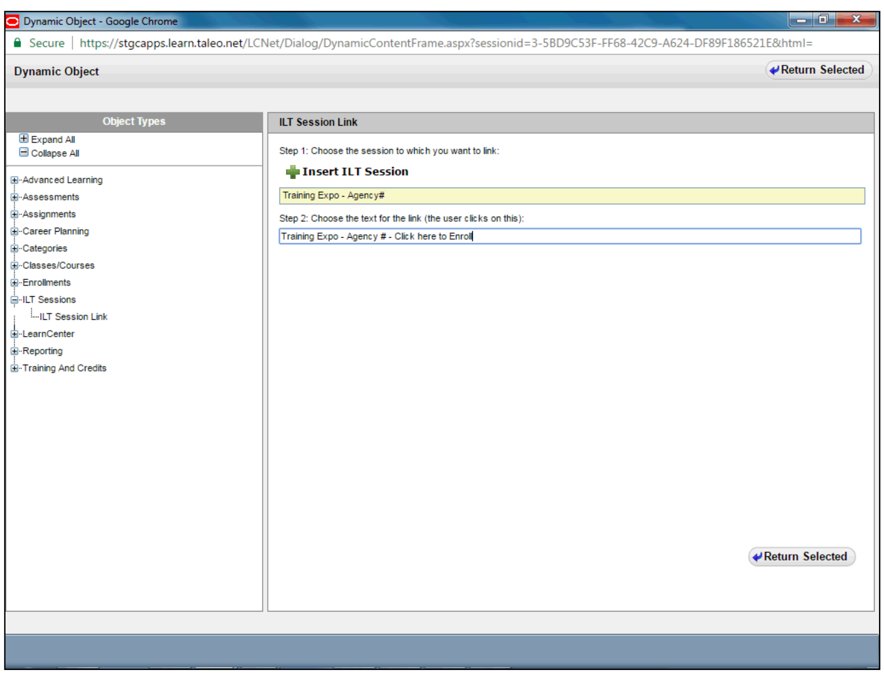
Step	Action
38.	Click the **Maximize** button. 



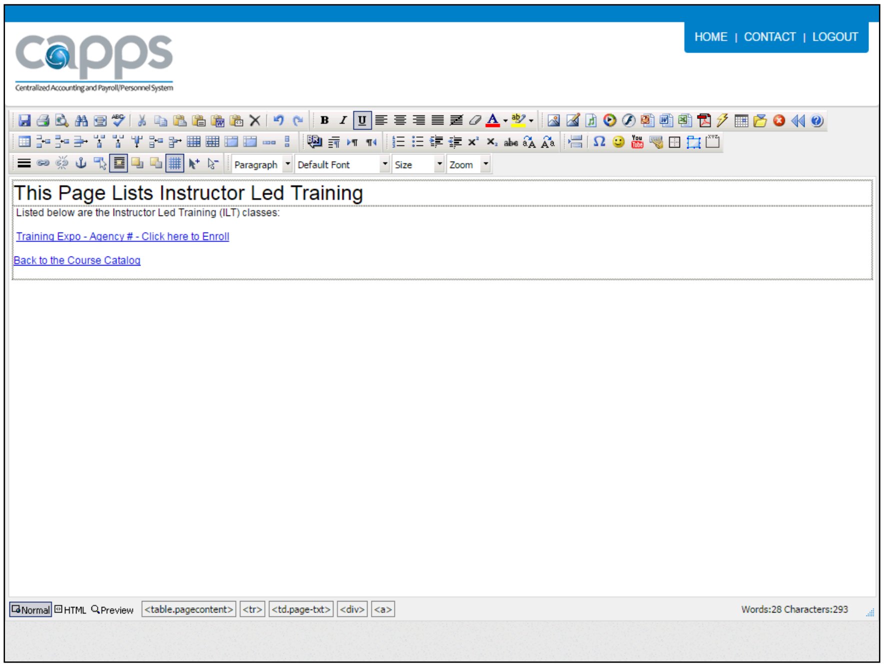
Step	Action
39.	Click the **ILT Sessions** link. ·ILT Sessions
40.	Click the **ILT Session** link. ·ILT Session Link
41.	Click the **Insert ILT Session** link. **Insert ILT Session**
42.	Click the **Training Expo - Agency#** option.
43.	Click the **Return Selected** link. Return Selected
44.	You will type the text as you want it to appear on the ILT Training Listing. Click the whitespace. Click Here
45.	Press **[Delete]**.



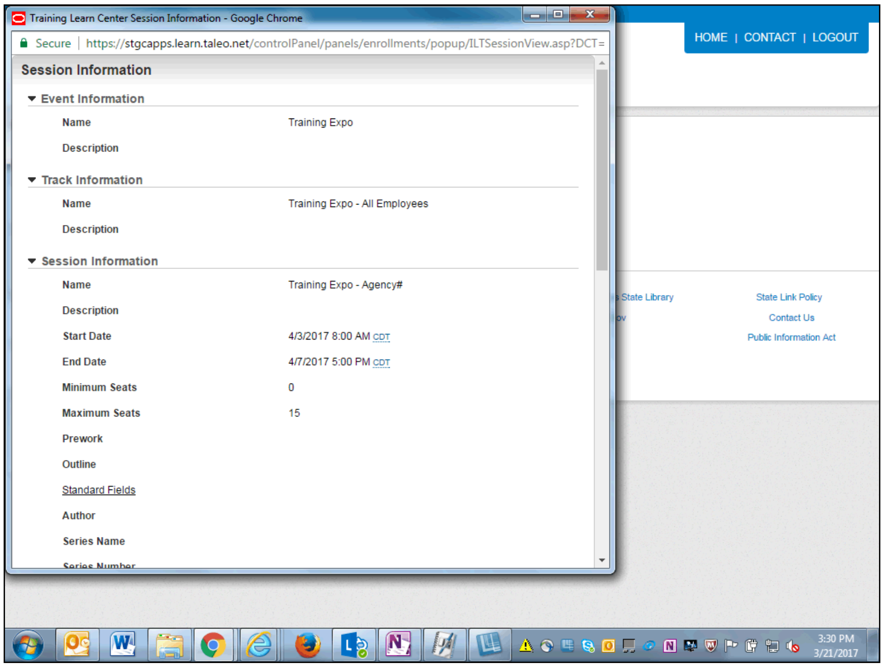
Step	Action
46.	Enter the desired information into the field. Enter "**Training Expo - Agency # - Click here to Enroll**".



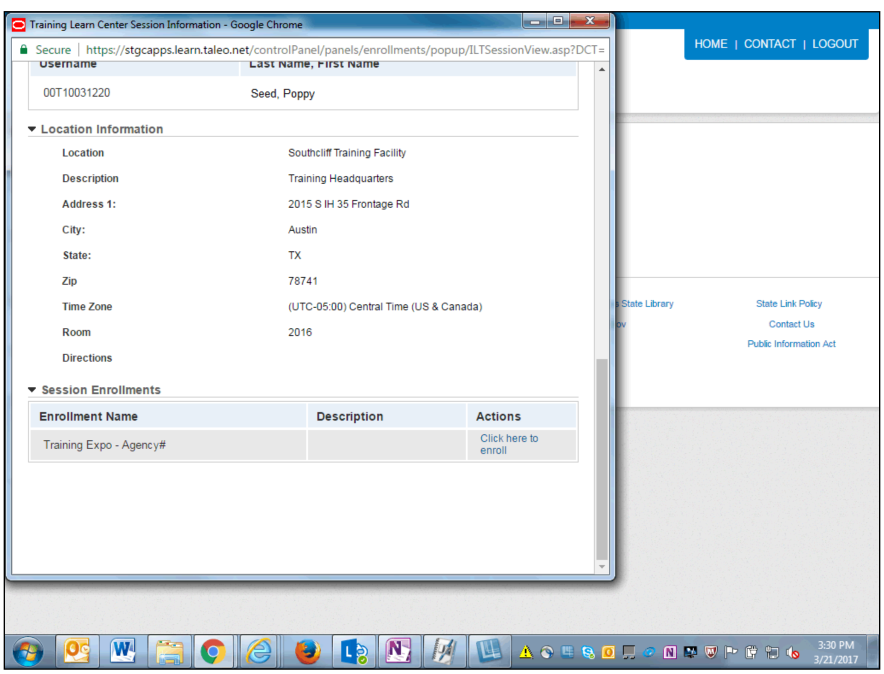
Step	Action
47.	Click the **Return Selected** button. Return Selected
48.	Your text is showing within the text field.



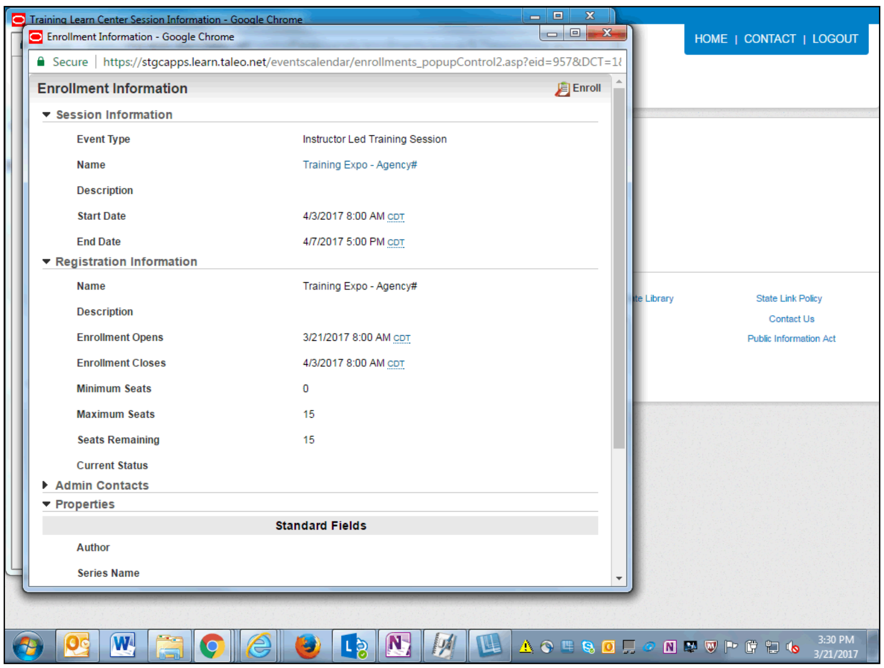
Step	Action
49.	Click the **Save** button.
50.	Click the **View** link.
51.	This how Users will see the listing of ILT classes.
52.	You can test the link from here. Click the **Training Expo - Agency # - Click here to Enroll Link** link. Training Expo - Agency # - Click here to Enroll



Step	Action
53.	The Session Information appears. Click the scrollbar.



Step	Action
54.	Click the **Click here to enroll** link. Click here to enroll
55.	The **User** will use the **Enroll** button at the top right of the page.



Step	Action
56.	Click the **Close** button. 
57.	Click the **Close** button. 
58.	Congratulations! You have completed this lesson. **End of Procedure.**

Creating Learning Plans

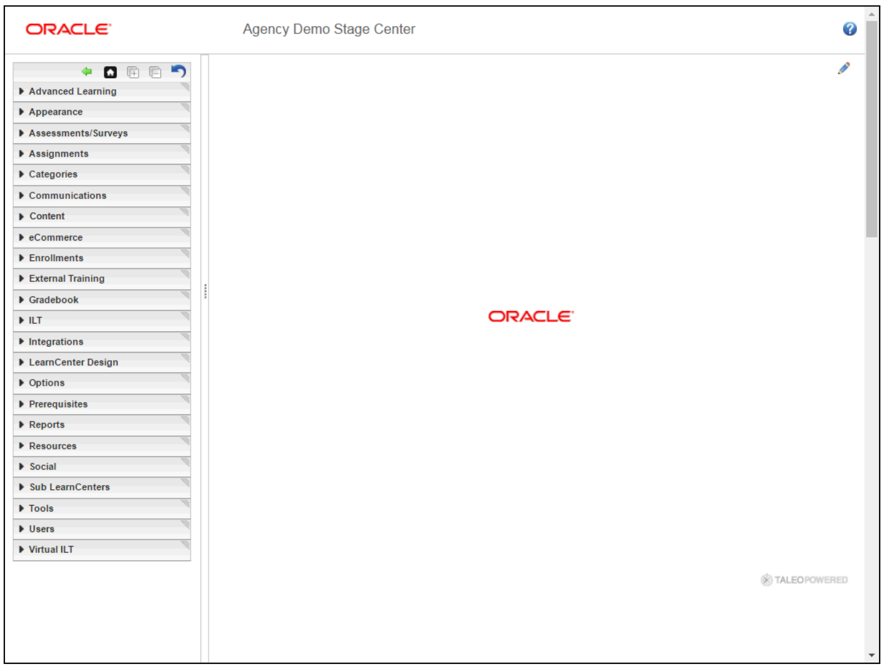
Section 2 - Lesson 3, Exercise 4 - **Creating Learning Plans**

Learning Plans are any combination of training items ranging from independent self study content like assignments, to guided learning activities including mentoring, web based training, and instructor-led or virtual instructor-led training (VILT). Learning Plans can include assessments, surveys, and virtual community activities like chat rooms and forums.

Procedure

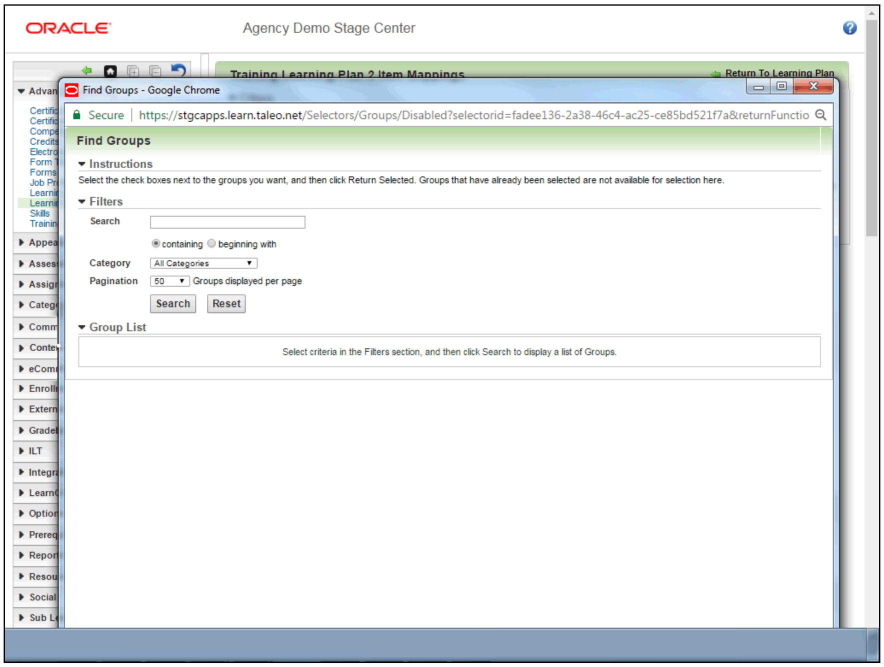
In this lesson, you will learn how to create a Learning Plan and assign it to the Training Group.

1) Learning Plan Name - Training Plan 2
2) Group - Training Group

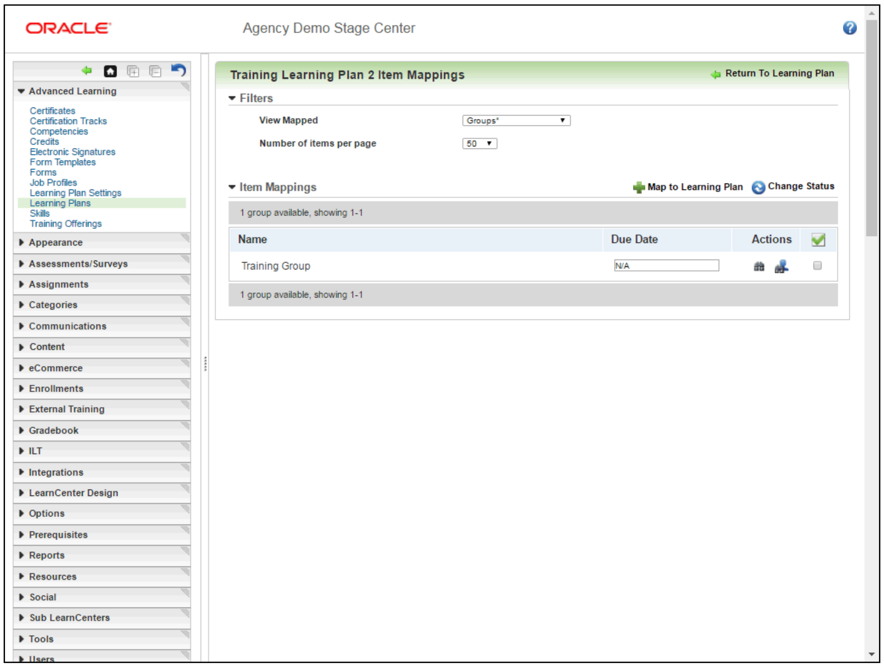


Step	Action
1.	Click the **Advanced Learning** link. Advanced Learning
2.	Click the **Learning Plans** link. Learning Plans
3.	Click the **Add Learning Plan** link. Add Learning Plan
4.	Enter the desired information into the **Name** field. Enter "**Training Learning Plan 2**".
5.	Click the scrollbar.

Step	Action
6.	Click the **Save** button. Save
7.	Click the **Mappings** tab. Mappings
8.	Click the button to the right of the **View Mapped** field. ▼
9.	Click the **Options** tab. Options
10.	Click the **Messages** tab. Messages
11.	Click the **Users** tab. Users
12.	Click the **Add/Delete Groups** link. Add/Delete Groups
13.	Click the **Map to Learning Plan** link. Map to Learning Plan



Step	Action
14.	You need to Search for the specific Group that will be mapped to this Learning Plan. Click the **Search** button. Search
15.	Click the **Selection for Training Group** option.
16.	Click the **Return Selected** link. Return Selected
17.	The Due Date for the Learning Plan should be entered. We will leave this blank for now.



Step	Action
18.	Click the **Return to Learning Plan** link. Return To Learning Plan
19.	The Learning Plan is assigned to all of the Users within the Learning Group.
20.	Click the **Save** button. Save
21.	Click the **Home** link.
22.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

Creating Skills/Add Notice & Notification

Section 2 - Lesson 3, Exercise 5 - **Creating Skills**

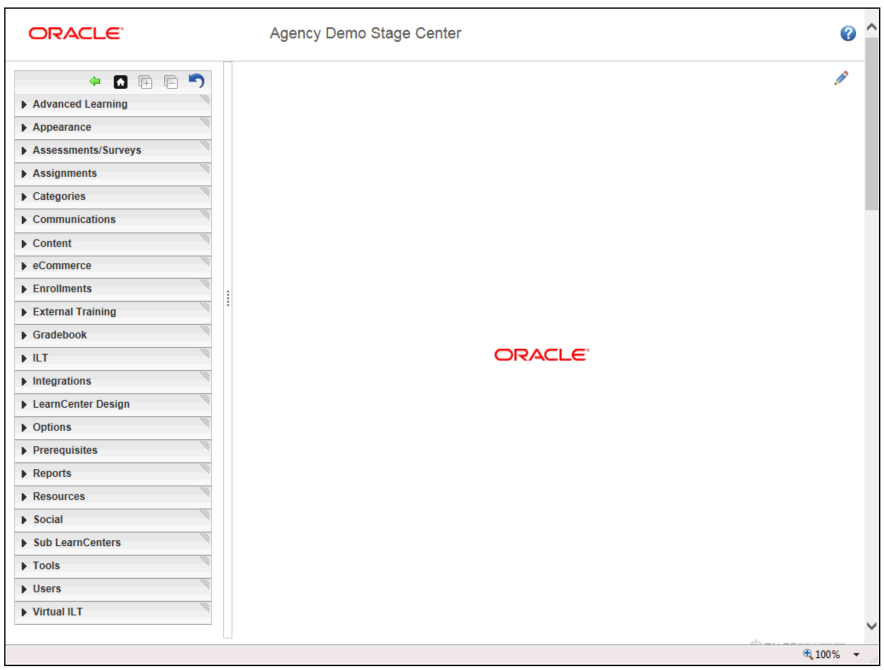
Organizations need to know what Skills are required and which of their employees have them, in order to fill certain positions, communicate expectations, and develop people's capabilities. An important step to utilizing the Advanced Learning module is to build a Skill library.

Your Skill library is a set of standardized Skills determined by tasks or procedures that a department performs in contributing to organizational and departmental Goals. Once you have defined which Skills are vital to your organization, you can begin creating them. You can then map them to Job Profiles, Users, and various learning items. You can also organize them by assigning them to Categories.

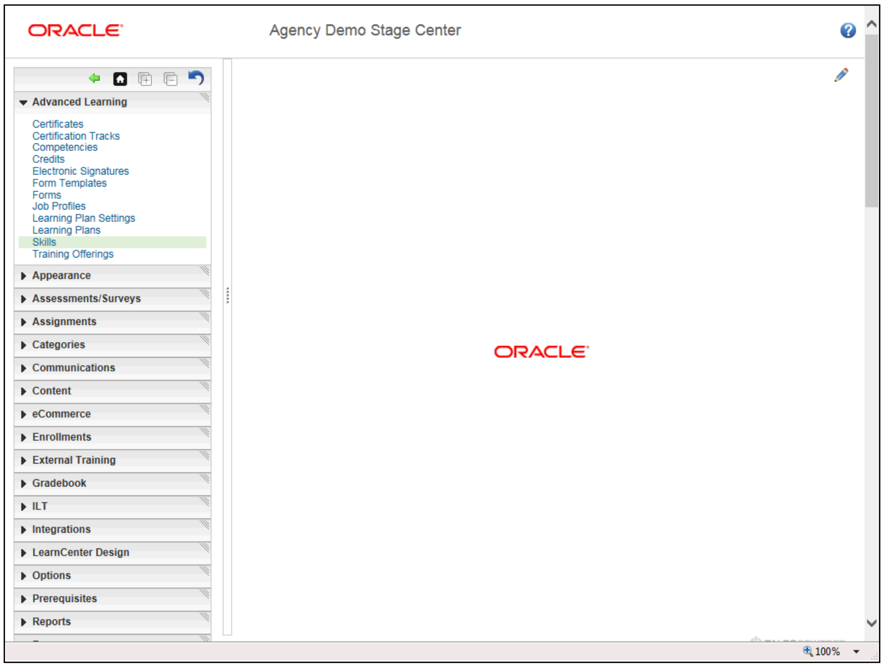
Procedure

In this lesson, you will learn how to create a Skill, map the skill to an assessment and assign the Skill to a User. You will also add a Notice and Notification.

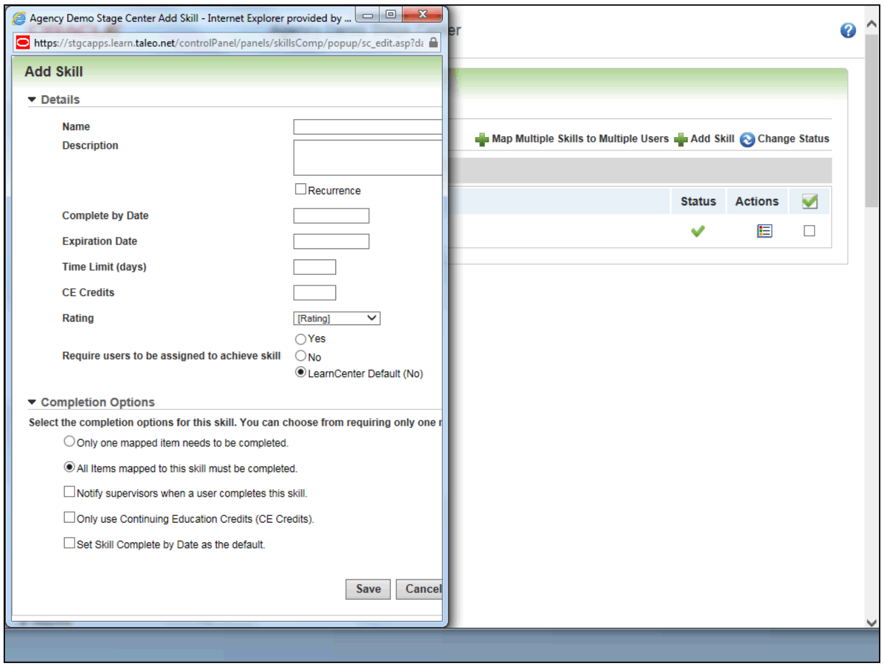
Name of Skill: Customer Service
Expiration Date: 7/10/2017
User: Poppy Seed



Step	Action
1.	Click the **Advanced Learning** link. Advanced Learning

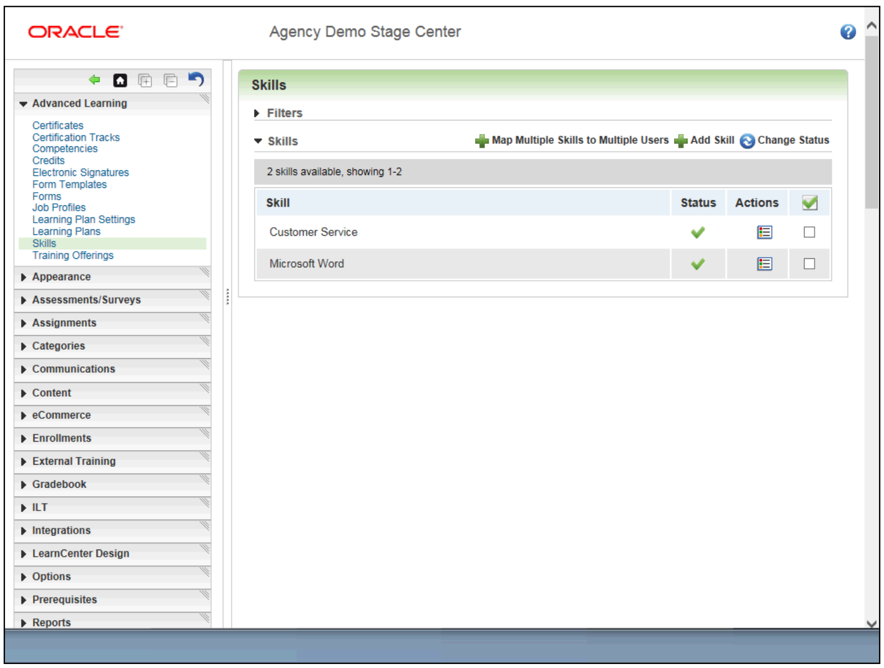


Step	Action
2.	Click the **Skills** link. Skills
3.	Click the **Add Skill** link. Add Skill

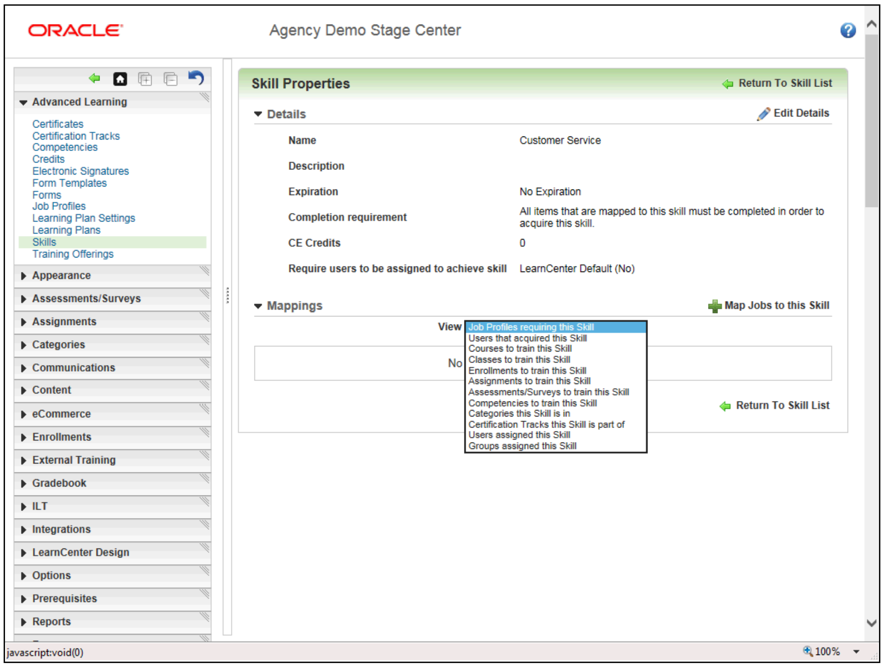


Step	Action
4.	Enter the desired information into the **Name** field. Enter "**Customer Service** ". Name
5.	Click in the **Complete by Date** field. Complete by Date
6.	Click the **Su** list. January Su Mo Tu We
7.	Click the **July** list item. July
8.	Click the **10** object. 10
9.	You can enter additional information for the Skill using the fields provided. In training, you will leave them blank.
10.	Click the **Notify supervisors when a user completes this skill.** option. Notify supervisors when a user completes this skill.

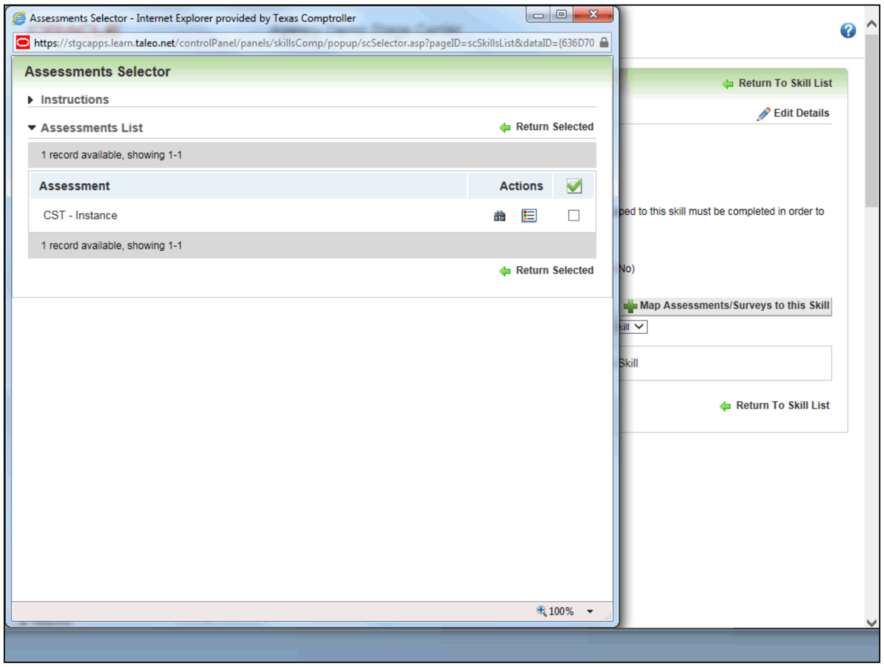
Step	Action
11.	Click the **Save** button. Save

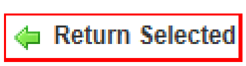


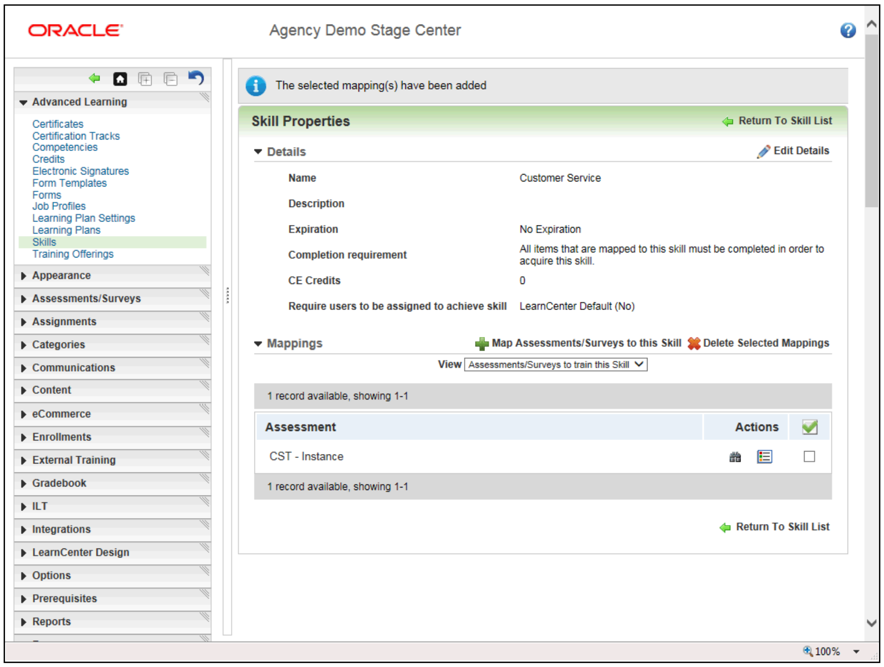
Step	Action
12.	Click the **Skills Properties** link.
13.	You are going to map an Assessment to this Skill. Click the button to the right of the **View** field.



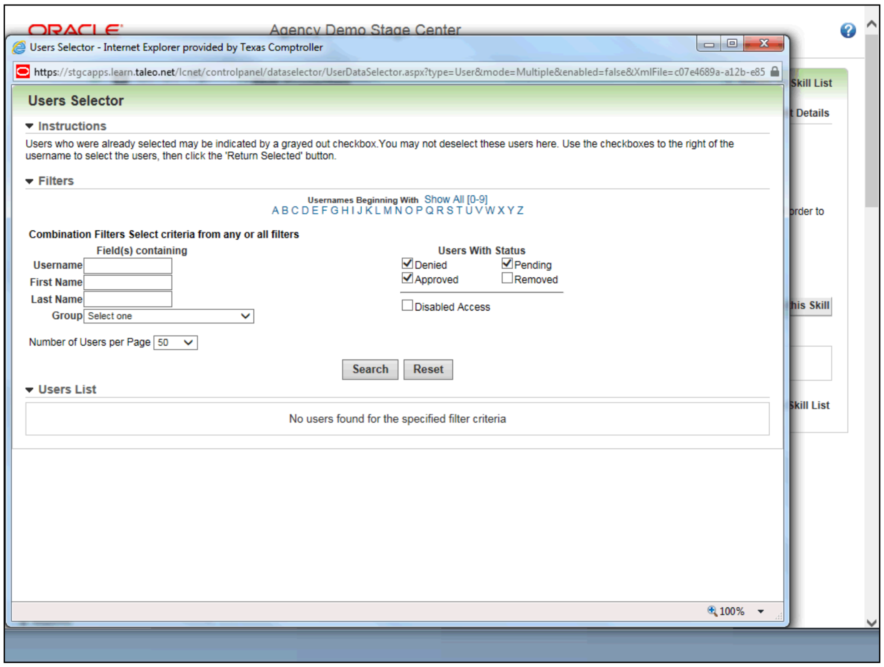
Step	Action
14.	Click the **Assessments/Surveys to train this Skill** list item. Assessments/Surveys to train this Skill
15.	Click the **Map Assessments/Surveys to this Skill** link. Map Assessments/Surveys to this Skill



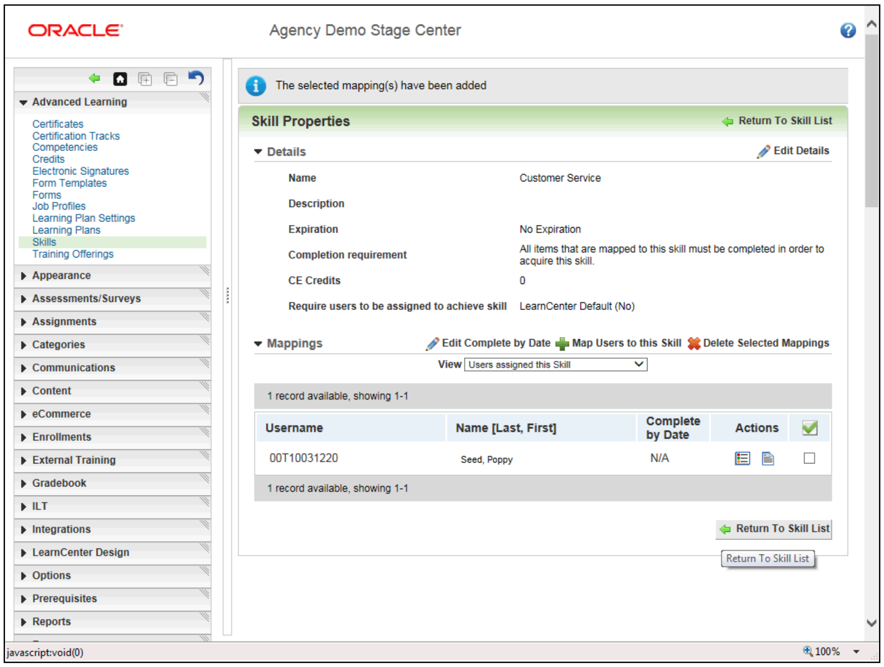
Step	Action
16.	There must be an Instance for the Skill selected. Instances should have already been created in the Instance table. If there isn't one listed then it must be created. Click the **CST - Instance** option. 
17.	Click the **Return Selected** link. 



Step	Action
18.	Click the **CST - Instance** option. CST - Instance
19.	Click the **Return To Skill List** link. Return To Skill List
20.	Click the **view properties** button.
21.	Now you are going to assign (map) the Skill to a User. Click the **View** list. View Job Profiles requiring this Skill
22.	Click the **Users assigned this Skill** list item. Users assigned this Skill
23.	Click the **Map Users to this Skill** link. Map Users to this Skill



Step	Action
24.	Enter the desired information into the **First Name** field. Enter "**Poppy**". First Name
25.	Click the **Search** button. Search
26.	Click the **Selection** option.
27.	Click the **Return Selected** link. Return Selected



Step	Action
28.	Click the **Return To Skill List** link. Return To Skill List
29.	Now you will set up the Notice and Notification for the Skill. Click the **Communications** link. Communications
30.	Click the **Notices** link. Notices
31.	Click the **Add Notice** link. Add Notice
32.	It is always beneficial to review the Add Notice Instructions for guidance. Click the **Instructions** caret. Instructions

Step	Action
33.	You should select a Name that identifies this notice. It appears in the subject line of the email. In training, you will use Skill Notice. Enter the desired information into the **Name** field. Enter "**Skill Notice**". Name
34.	Enter the desired information into the **Subject** field. Enter "**Skill Notice Reminder**". Subject
35.	Click the **Company** list item. Company
36.	Click the **move selected items** button.
37.	Click the **Department** list item. Department
38.	Click the **move selected items** button.
39.	Click the **Skill/Assignment Name** list item. Skill/Assignment Name
40.	Click the **move selected items** button.
41.	Click the **Expiration/Due Date** list item. Expiration/Due Date
42.	Click the **move selected items** button.
43.	Click the **Save** button. Save
44.	Click the **Notifications** link. Notifications
45.	Click the **Add Notification** link. Add Notification

Step	Action
46.	Click the **Notice** list. Notice [Select one]
47.	Click the **Skill Notice** list item. Skill Notice
48.	Click the **Item Mapping Type** list. Item Mapping Type [Select one]
49.	Click the **Skill** list item. Skill
50.	Enter the desired information into the **Send notification** field. Enter "**10**". Send notification 0 days [Select one] skill expiration date
51.	Click the **days** list. Send notification 10 days [Select one] skill expiration date
52.	Click the **prior** list item. prior
53.	Click the **User's Supervisor** option. User's Supervisor **with optional prefix text:**
54.	Click the **Save** button. Save
55.	Click the **Collapse All** button.
56.	Click the **Control Panel Home** button.
57.	Congratulations! You have completed this lesson. **End of Procedure.**

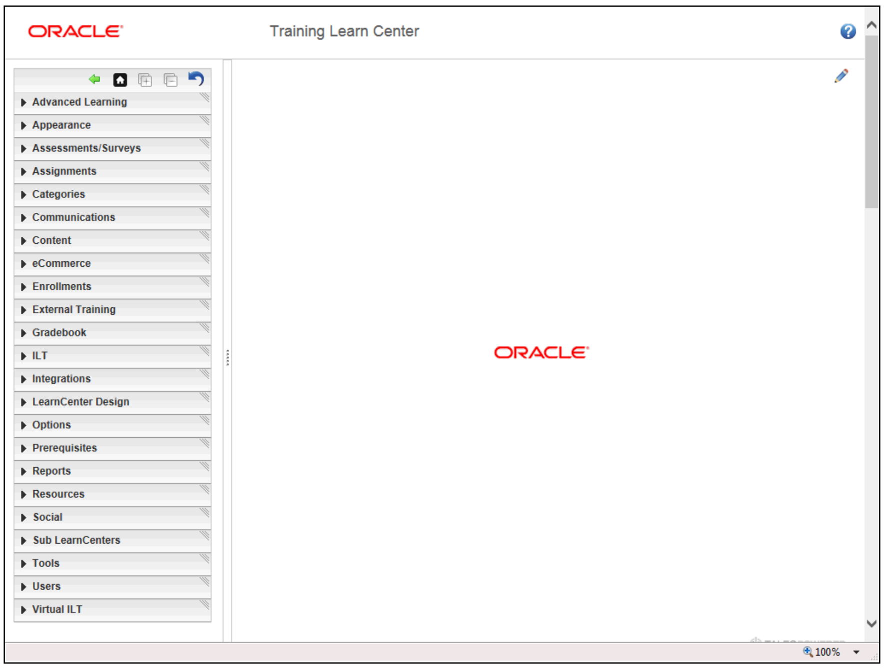
Creating ILT Certificates

Section 2 - Lesson 3, Exercise 6 - **Creating ILT Certificates**

Procedure

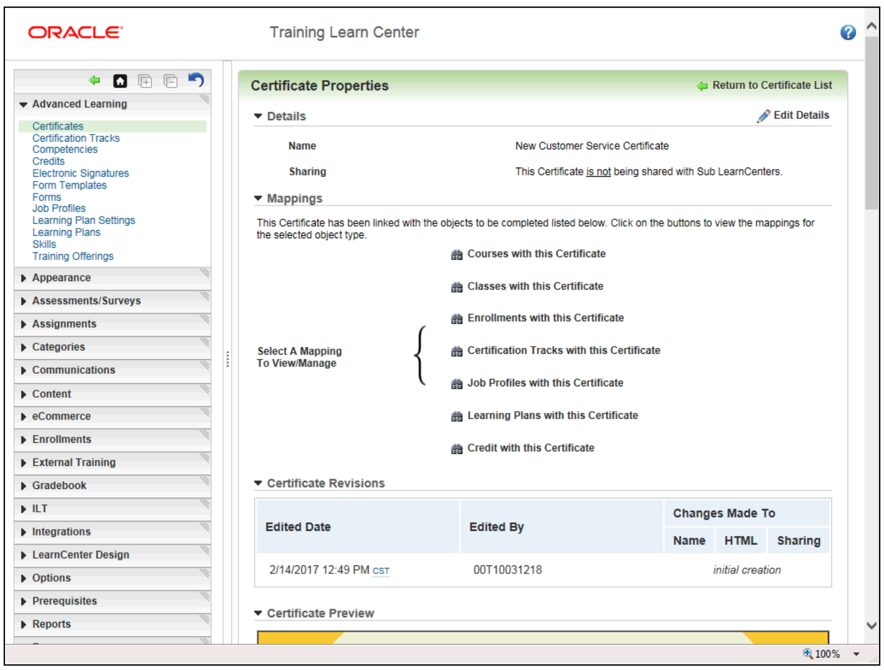
In this lesson, you will learn how to create a certificate for an ILT.

1) Certificate Name: New Customer Service Certificate
2) Enrollment ILT Session: CST - Finance
3) Attendee: Carbon Copy

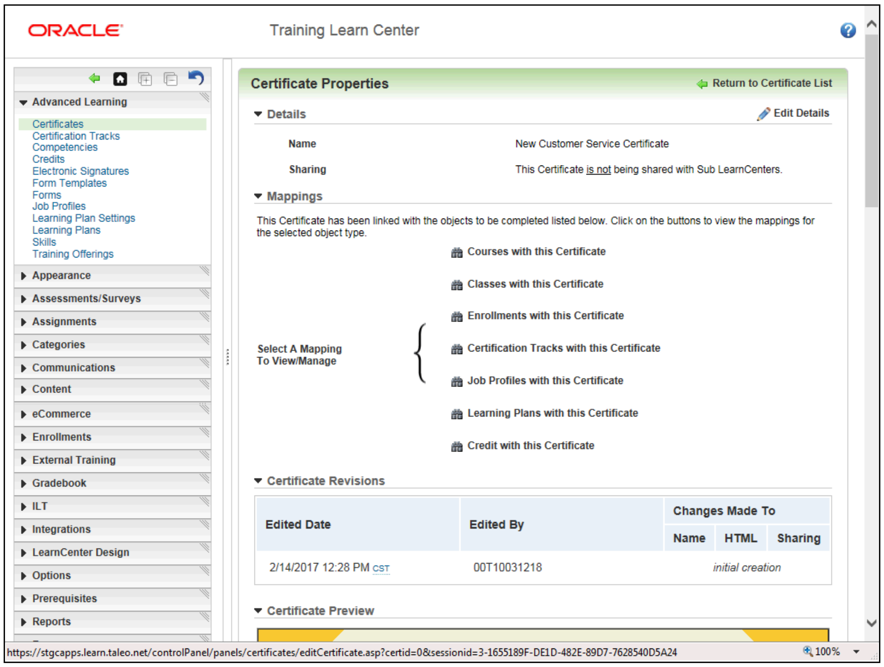


Step	Action
1.	Click the **Advanced Learning** link. Advanced Learning
2.	Click the **Certificates** link. Certificates
3.	There is one certificate listed named Customer Service. You will create a new one. Click the **Add Certificate** link. Add Certificate
4.	Click in the **Name** field. Name New Certificate
5.	Click the (x) to delete the text in the field. Click in the **X** field. x

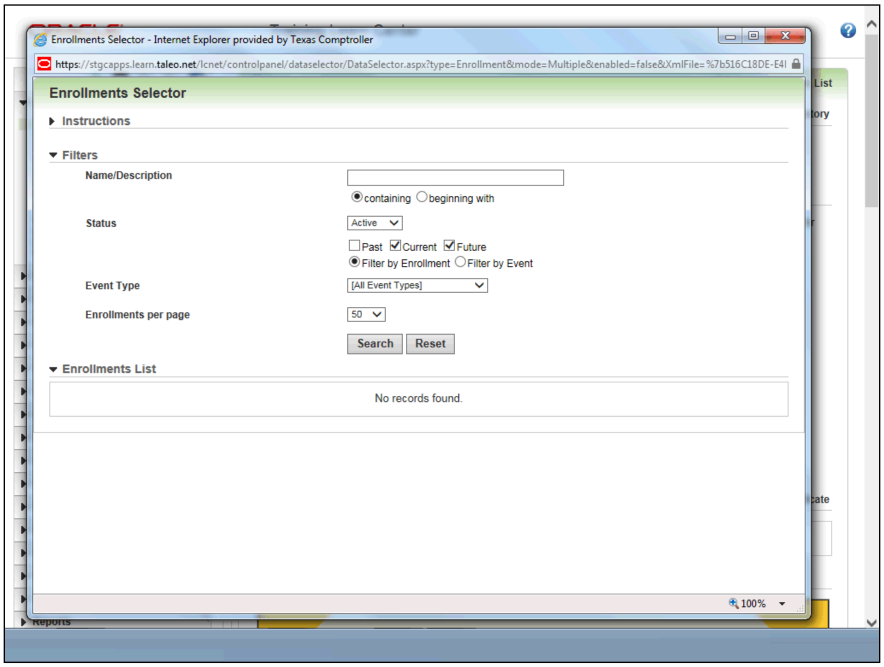
Step	Action
6.	Enter the desired information into the **Name** field. Enter "**New Customer Service Certificate**". Name
7.	Click the scrollbar.
8.	Click the **Save** button. Save



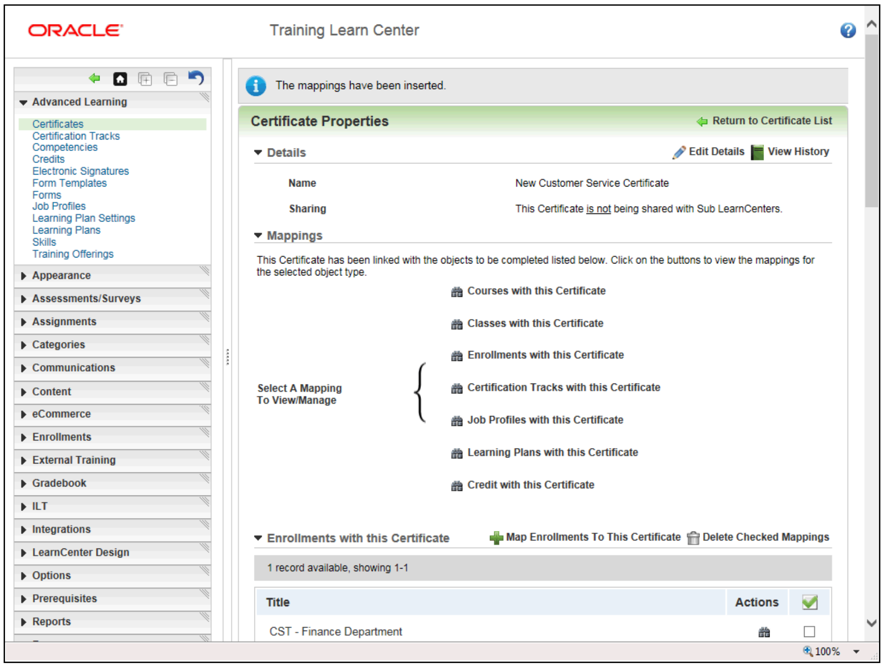
Step	Action
9.	The layout of the certificate is below. Click the scrollbar.
10.	Click the scrollbar.
11.	The Mappings here will open up options to view/manage your certificate.



Step	Action
12.	Click the **Enrollments with this Certificate** link. Enrollments with this Certificate
13.	Click the **Map Enrollments To This Certificate** link. Map Enrollments To This Certificate

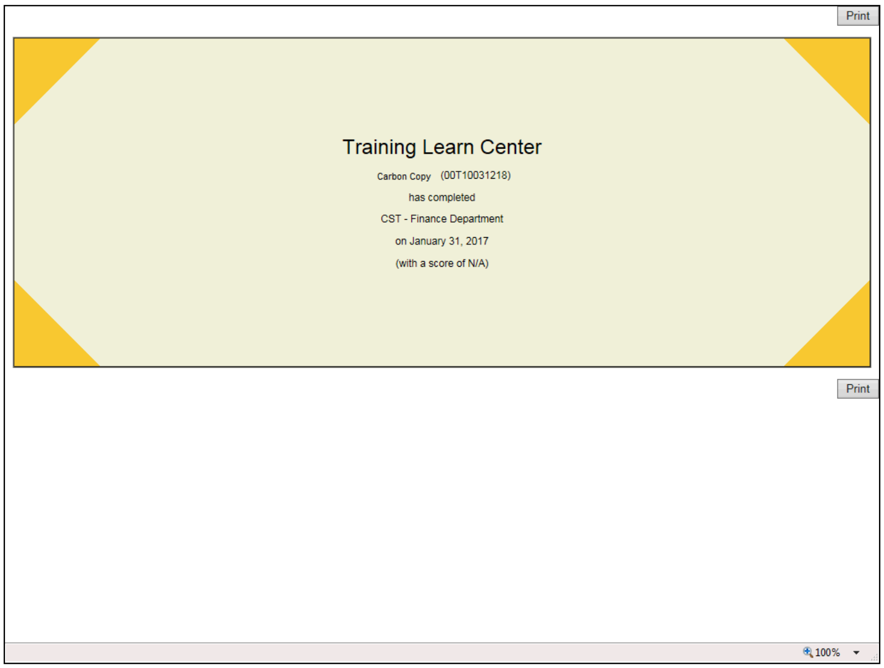


Step	Action
14.	In order for a Certificate to be filled in with data the status of the event must be in the past and the User marked complete. Click the **Past** option. Past
15.	Enter the desired information into the **containing** field. Enter "**cst**".
16.	Click the **Search** button. Search
17.	Click the **Selection** option.
18.	Click the **Return Selected** link. Return Selected

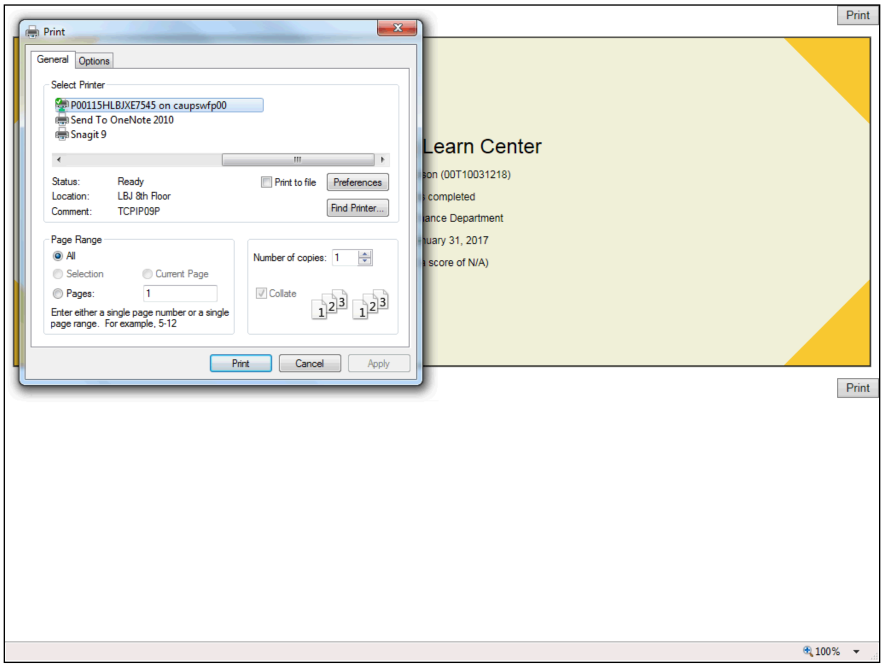


Step	Action
19.	Click the **Return to Certificate List** link. 
20.	The New Certificate that was created is listed with the date and time. Now you will go to enrollments to see the certificate with User information.
21.	You are going to navigate to Enrollments to see the certificate for a User that has completed the ILT. Click the **Enrollments** link. 
22.	Click the **Enrollments** link. 
23.	If the enrollment for the session isn't already defaulted on this page, don't forget to use Filters above. Click the **View Enrollment Users** button. 
24.	Click the scrollbar. 

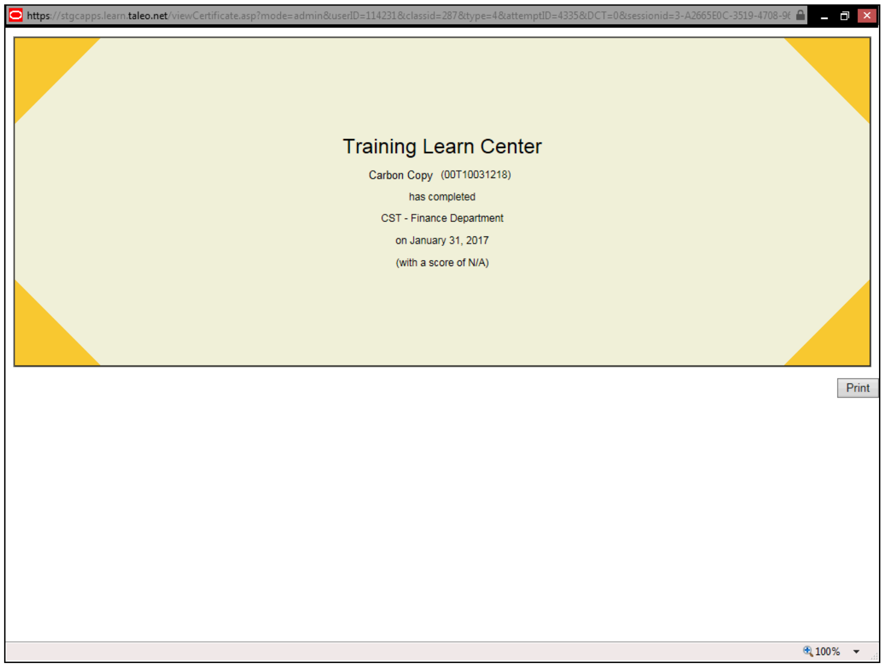
Step	Action
25.	Click the **Selection** option.
26.	Click the **View Certificates** link. View Certificates



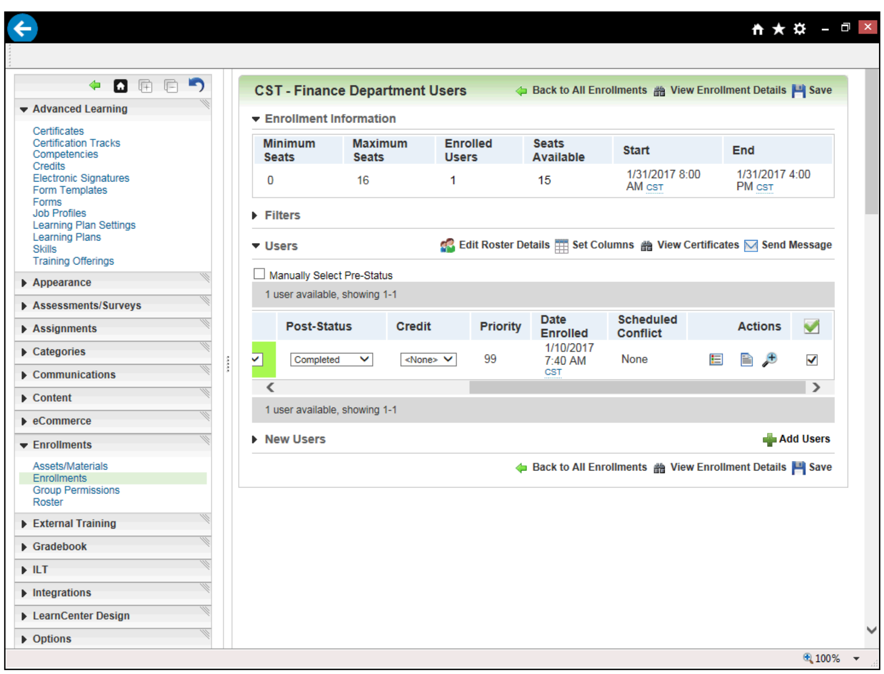
Step	Action
27.	You have an option to print from this screen. Click the **Print** button. Print



Step	Action
28.	You won't actually print at this time. Click the **Cancel** button. 



Step	Action
29.	Click the **Close Tab (Ctrl+W)** button.



Step	Action
30.	Click the **Collapse All** button.
31.	Click the **Control Panel Home** button.
32.	Congratulations! You have successfully completed this lesson. **End of Procedure.**

S3 - Reporting

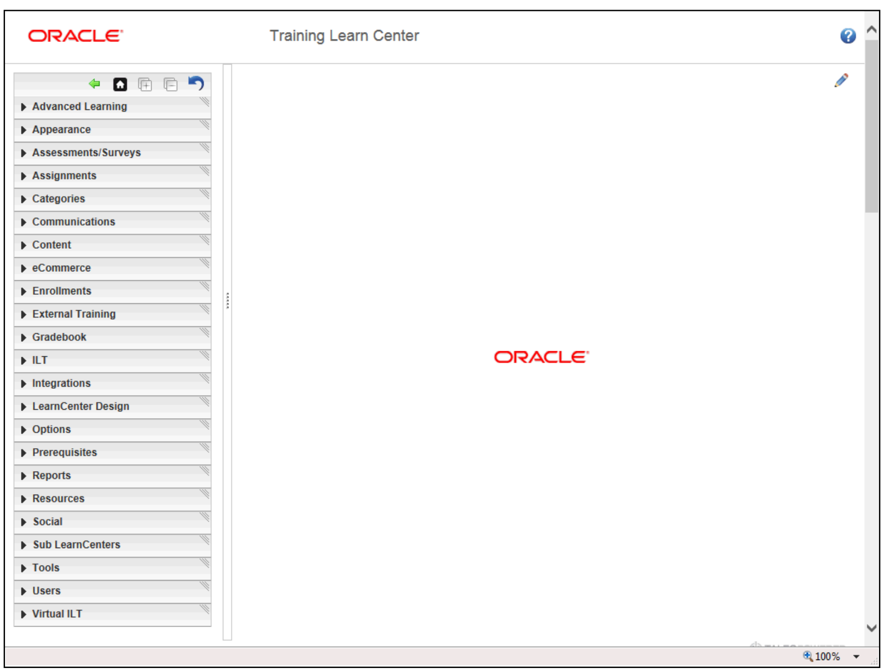
Running a BI Report

Section 3 - Lesson 1, Exercise 1 - **Running a BI Report**

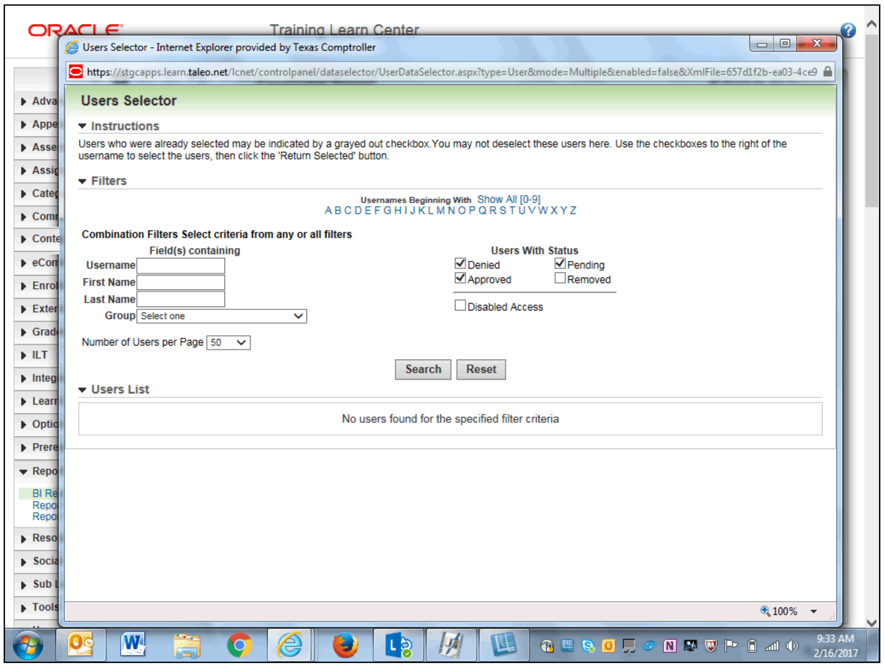
Procedure

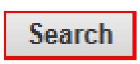
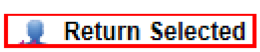
In this lesson, you will learn how to run a BI Report.

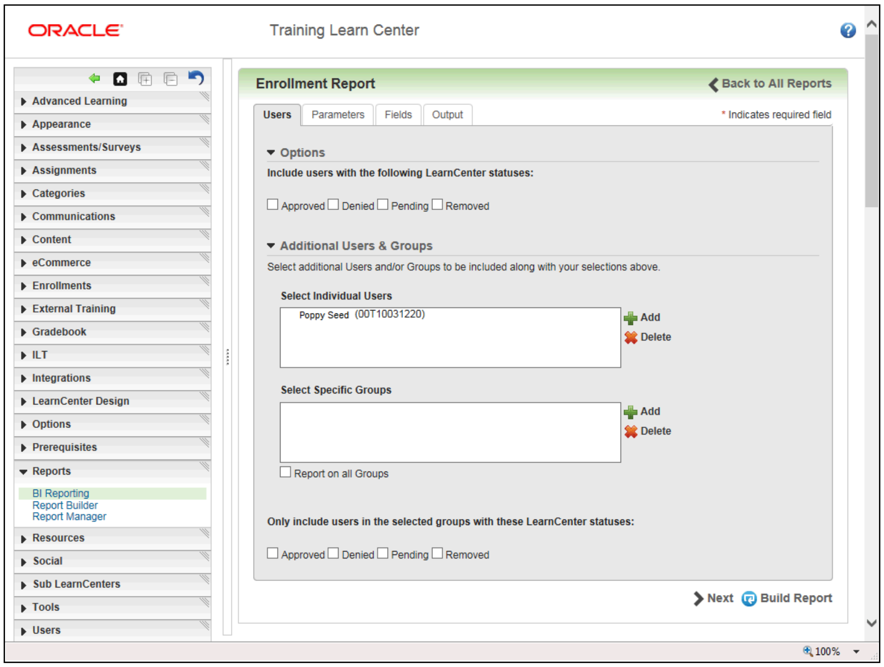
Report Name: Enrollment Report



Step	Action
1.	Click the **Reports** link. Reports
2.	Click the **BI Reporting** link. BI Reporting
3.	This page contains standard reports that are listed in alphabetical order.
4.	There are 15 or more standard reports. Additional reports can be seen by clicking the **Load More Link** below. Click the scrollbar.
5.	Click the **Load More** link. LOAD MORE
6.	You will run the Enrollment Report. Click the **Enrollment Report** link. Enrollment Report
7.	There are four tabs that will require criteria or information for this report.
8.	In this example, you are going to deselect the Approved status. Click the **Approved** option. ☑ Approved
9.	You will search for an Individual User. Click the **Add** link. Add



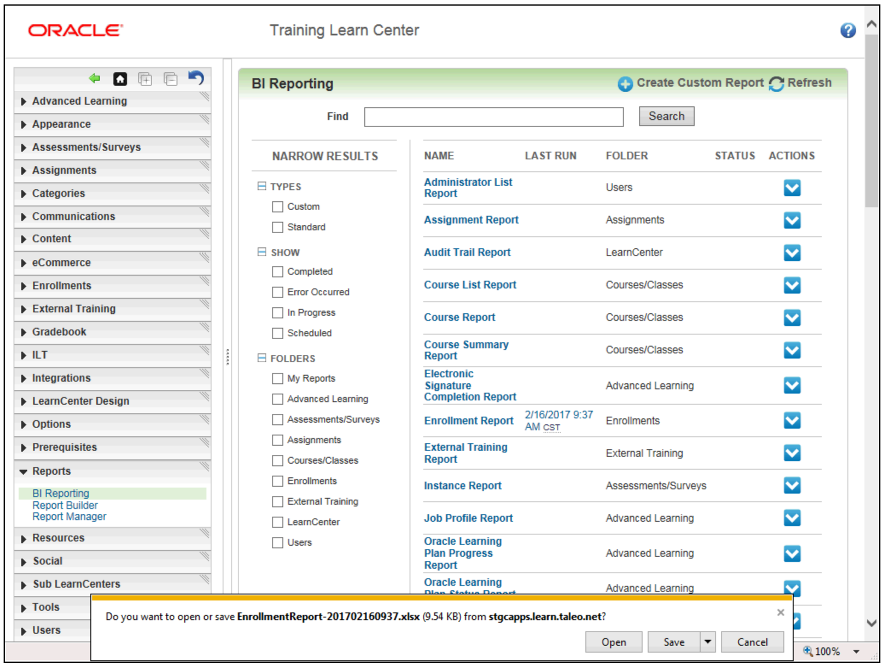
Step	Action
10.	Use the Filters to locate the user. Enter the desired information into the **First Name** field. Enter "**poppy**". 
11.	Click the **Search** button. 
12.	Click the **Selection** option. 
13.	Click the **Return Selected** link. 

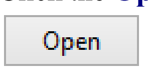


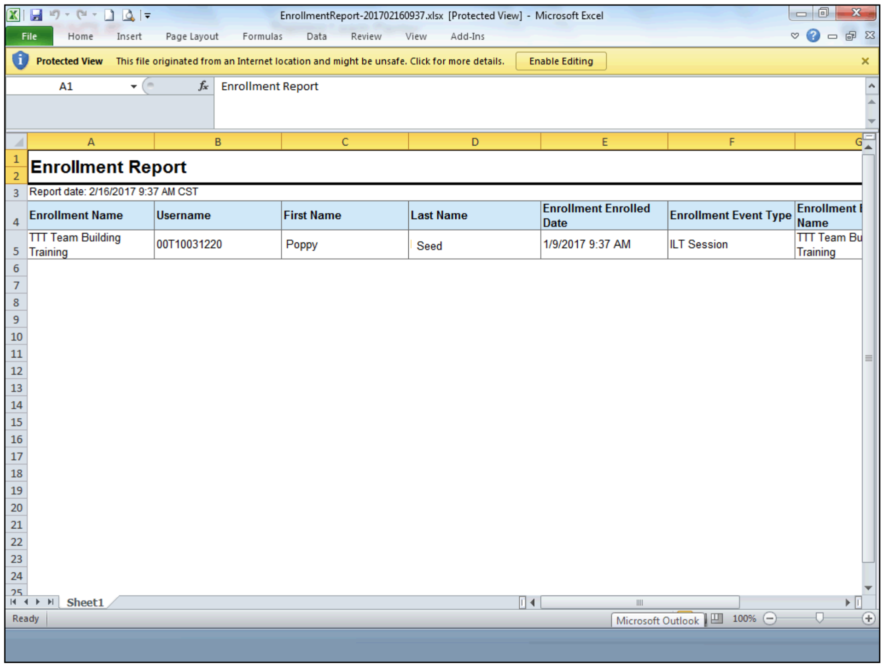
Step	Action
14.	You will move to the Parameters tab. Click the **Next** button. Next
15.	You are going to select your own LearnCenter if it isn't automatically populated. This is a required field noted by the red asterisk. In training, you will use home/AgencyDemo. Click the **home/AgencyDemo** list item. home/AgencyDemo
16.	Click the **Add >>** button. Add >>
17.	You have the option of selecting a particular Enrollment for this user or report on all Enrollments. Click the **Report on all Enrollments** option. Report on all Enrollments

Step	Action
18.	Click the **LearnCenter** list item. LearnCenter
19.	Click the **Add >>** button. Add >>
20.	Click the **ILT Session** list item. ILT Session
21.	Click the **Add >>** button. Add >>
22.	Click the **Class** list item. Class
23.	Click the **Add >>** button. Add >>
24.	Click the scrollbar.
25.	Click the **Nominated** list item. Nominated
26.	Click the **Add >>** button. Add >>
27.	Click the **Approved** list item. Approved
28.	Click the **Add >>** button. Add >>
29.	Click the scrollbar.
30.	Click the **Completed** list item. Completed
31.	Click the **Add >>** button. Add >>
32.	Click the **Completed** option. Completed

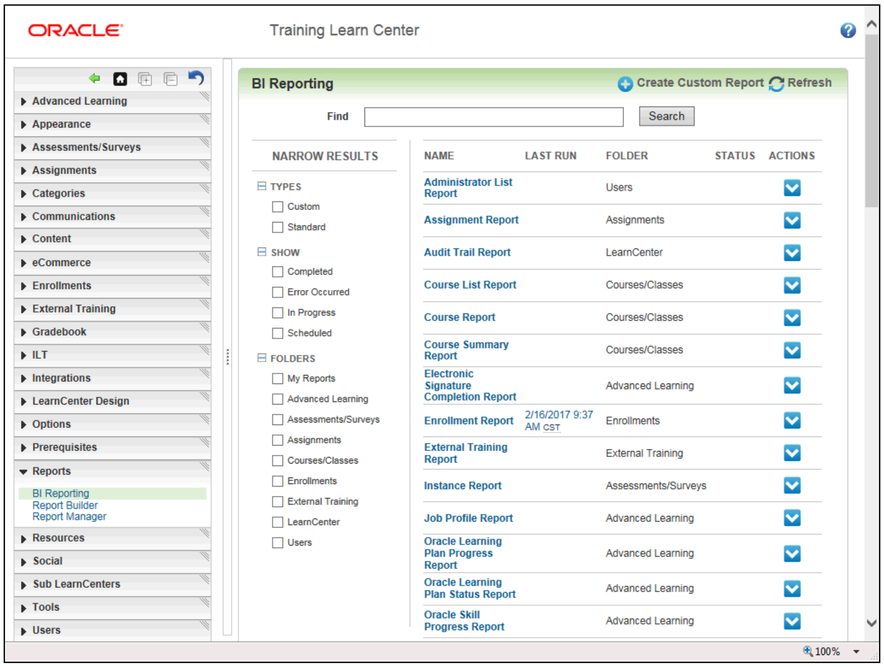
Step	Action
33.	Click the **Next** button. Next
34.	Click the scrollbar.
35.	The grayed out fields on the right side of the page will default on your report. You have the option of deselecting the defaults and including the fields of your choice.
36.	Click the **Next** button. Next
37.	Click the scrollbar.
38.	The **Output Format** should always be XLS. Click the **Output Format** list. **Output Format** PDF
39.	Click the **XLS** list item. XLS
40.	Click the **Include link to the report** option. Include link to the repor
41.	Click the **Build Report** button. Build Report
42.	The **Enrollment Report** is In Progress.
43.	Click the **Refresh** button. Refresh
44.	When the date and time is listed, your report is ready for review. Click the **2/16/2017 9:37 AM CST** link. 2/16/2017 9:37 AM CST

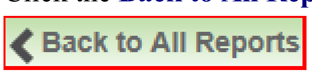
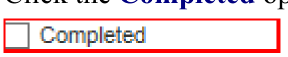


Step	Action
45.	Click the **Open** button. 
46.	The **Enrollment Report** contains the information that you have requested. You are able to manipulate this report as you see fit.



Step	Action
47.	Click the scrollbar. 
48.	Click the **Close** button. 



Step	Action
49.	Click the **Actions** button. 
50.	Click the **View History** link. 
51.	The **View History** option lists the report and the date/time that it was run within the past 90 days.
52.	You have the option to delete any report that is listed in history.
53.	Click the **Back to All Reports** button. 
54.	You can select one of the Narrow Results options to reduce the reports list. Click the **Completed** option. 
55.	Click the **Completed** option. 
56.	Click the **My Reports** option. 

Step	Action
57.	Click the **My Reports** option. 
58.	Click the **Collapse All** button. 
59.	Click the **Control Panel Home** button. 
60.	Congratulations! You have successfully completed this lesson. **End of Procedure.**